INSTRUCTIONS FOR COMPLETING THE ONLINE TRAVEL APPLICATION

1. The online application is completed in the manner listed below. (Note: The traveler or another employee may enter the application. These instructions are intended for whoever is preparing the application. Additionally, since the online system is still being developed, the preparer should follow the online instructions if they are different from these instructions.)

   a. Access the online travel site at www.fiscal.ttuhsc.edu/travel/main/travelhome.asp (Note: At the travel site's home page, the employee may click on one of the links on the right side of the screen to learn more about the online travel system, review the travel OPs, or view past email announcements about the travel system.

   b. Click on the "Application" link on the left side of the screen.

   c. Enter the **preparer's** eRaider user ID and password. (Note: this screen has links to set up an eRaider account or to assist the preparer who has forgotten his or her eRaider password.) Click on the "Submit" button.

   d. The first time a preparer logs onto the travel site, the next screen will request his or her telephone number and supervisor's eRaider logon ID. This will allow the travel system to direct a copy of online travel activity to the proper supervisor. There also is a box for the preparer to subscribe to travel email messages regarding travel system changes. The default setting is checked. When completed, click on the "Submit" button. A second screen will appear asking the preparer to confirm the name of the supervisor. If the name is not correct, click on the "<<Back" button and enter the correct eRaider logon ID and proceed. Click on the "Next>>" button if the name is correct. (Note: These two screens will not appear again.)

   e. The next screen is entitled "Application Menu." To complete a new travel application, click on the link "Fill out a Travel Application."

   f. Enter the social security number or Tech ID number of the **traveler**. (Do not use dashes between the numbers.) Identify if the traveler is an employee, student, prospective employee, or a non-employee/speaker/participant. Click on the "Next>>" button. (If another person is preparing the application for a first-time traveler, the preparer will need to enter the eRaider logon ID of the traveler's supervisor.)

   g. The next screen, "Vendor Record," is used to verify the vendor information found for the social security/Tech ID number entered previously. Since reimbursement/travel advance checks will be sent to this address, the preparer should ensure that the information is correct. For TTU employees, this address should be their campus mail stop. **Modify the record only if the information is necessary for mailing purposes**. When this has been done or if no changes are necessary, click on the "Next>>" button.

   h. On the next screen, the preparer will begin to specify the information required for the current trip. (Note: The preparer may tab between the required fields.)

      (1) For "Start Date," enter the date the traveler will leave the designated headquarters. Use an "mmddyy" format.

      (2) For "End Date," enter the date the traveler will return to the designated headquarters. Use an "mmddyy" format.

      (3) Under "Originating Locale," enter the city and state from which the employee will begin the official state travel. In most cases, this will be the employee's designated headquarters.

      (4) The duty point for the trip should be listed under "Major Destination."

(a) If the traveler has more than one duty point, list the employee's final duty point before he or she returns to the designated headquarters. The intermediate duty points should be listed under "Travel Explanation." (See Section (6) below.)

(b) If the duty point is Washington, D.C., a dialogue box will appear when the preparer completes this screen. The preparer will be cautioned that the traveler must complete a "Report of State Agency Travel to Washington, D.C." if the trip is being reimbursed with state appropriated funds, and the form's Web site location will be given. A copy of the completed form must accompany the voucher submitted for reimbursement after completion of the trip.

(c) If the duty point is located in a foreign country other than Canada or Mexico, a dialogue box will appear when this screen is completed reminding the preparer that the traveler must have written approval for the trip at least 30 days prior to the departure date, and that a copy of the written approval must accompany the voucher submitted for reimbursement after completion of the trip. (See OP 79.05.)

(5) State the purpose for the travel. Choices include "Attend Conference," "Travel Between Campuses," "Present Paper," "Continuing Education", or "Other." Highlight one of these selections.

(6) For "Travel Explanation," state the purpose of the travel; i.e., explain why the trip is necessary for the use and benefit of TTU and/or if it is required in the performance of duties by the employee. If the traveler is presenting original research, give the name of the professional organization (do not use abbreviations), the nature of the meeting, title of the paper, and publication plans and their status. List any other pertinent data supporting the application.

(7) Click on the "Next>>" button.

i. The next screen asks if the traveler will be taking leave during this trip.

(1) If no, click on the "Next>>" button.

(2) If yes, check the empty box. The preparer then will be asked to supply the following information: the start and end dates of the personal leave, and the city, state, and country where the leave will be taken. When this information has been completed, click on the "Next>>" button.

j. The next screen asks if the traveler wants to use a university Business Travel Account (BTA) for the airfare. This is also known as a Transportation Request (TR). (See OP 79.06.)

(1) If no, click on the "Next>>" button.

(2) If yes, check the empty box. The preparer then will be asked to supply the following information:

(a) In order to qualify for a BTA/TR, the traveler must state that he/she does not qualify for or has been denied a state travel card. Please check the appropriate button.

(b) The name of a travel agency and contracted agent handling the reservations. (A scroll-down list is available.)

(c) The TechFIM account to be charged.

(d) The estimated cost of the airfare. (Do not use commas when entering the dollar amount.)

(e) The traveler's ultimate destination city and state.

(f) Click on the "Next>>" button.

(3) If the preparer has entered travel dates that indicate the trip has already occurred, this screen will advise that the traveler is ineligible to request a BTA.

k. The next screen will ask for an estimate of travel expenses. (Note: The expenses should **not** include any prepaid amount.)

(1) Commercial Airfare. If the traveler will be using commercial airlines, complete this box. (Note: If the traveler has requested a BTA/TR, this box will be accessed from that screen. There also is a link on the right side of the screen for the preparer to view the state contract rates. These rates open in a separate viewing screen that can be closed when the correct rate is located.)

(2) The travel site will automatically calculate the number of days for both meal and lodging expenses. Enter the unit cost per day, and the travel site will automatically extend the correct amount to the "Expense Total" column. (Note: The preparer can view the allowable rates for meals and lodging for the destination city by clicking on the links on the right side of the screen. These rates open in a separate viewing screen that can be closed when the correct rate is located.)

(3) If the traveler expects to use a rental car, enter the number of days and the unit cost. (Note: The preparer can view the contract rates for rental cars by clicking on the link on the right side of the screen. These rates open in a separate viewing screen that can be closed when the correct rate is located.) The travel site will automatically extend the correct amount to the "Expense Total" column.

(4) If a personal auto is used, enter the estimated number of miles. The travel site will automatically extend the correct amount to the "Expense Total" column.

(5) Enter estimates for taxis, parking, and other expenses. If the traveler anticipates expenses for other things such as apartment rental, chartered buses, public transportation, use of a personal plane, or registration fees, click on the "Show other expenses" link to enter these estimates. If the traveler will be paying registration fees, see the footnote regarding the different methods of paying the fees for TTU and HSC employees.

(6) The travel site will automatically calculate the total estimated expenses. When all expenses have been entered, click on the "Next>>" button.

l. The next screen will request the accounts from which the trips total expenses will be paid. Up to four different accounts may be used, and the preparer should indicate the estimated amount to be charged against each accounting line. (Note: The amounts distributed between multiple accounts must total the "Total Expenses" listed before the travel site will allow the preparer to go to the next screen. **In addition, each of the accounts listed must have an active budget line available for travel, and the funds estimated for that account must be available before the travel site will allow the preparer to go to the next screen**. If the budget lines or the funds are not available, the preparer/traveler must consult with the appropriate account manager before continuing with the travel application.) When this screen is complete, click on the "Next>>" button.

m. The next screen will ask if the traveler needs a travel advance (TA). (See OP 79.07.)

(1) If no, click on the "Next->" button.

(2) If yes, check the empty box. The preparer will then be asked to supply the following information:

(a) In order to qualify for a TA, the traveler must state that he or she does not qualify for a state travel card because of infrequent travel or has been denied a state travel card. Please check the appropriate button.

(b) If the traveler has used his or her state travel card to purchase an airline ticket well in advance of the trip in order to receive a discounted fare, and will receive the credit card statement before the trip is taken, the traveler may request a TA for the amount of the ticket. In this case, enter the name of the airline used and the confirmation number. When the traveler receives the credit card statement, he or she may present a copy of the charge card bill and pick up the TA. (Note: This option is not available if the traveler has requested a BTA/TR on a previous screen or if the ticket is not purchased with a state travel card.)

(c) Enter the amount requested for airfare and/or other expenses. (Note: The travel site will automatically calculate the maximum that may be requested for a TA.) Click on the “Next>>” button.

(3) If the preparer has entered travel dates that indicate the trip has already occurred, this screen will advise that the traveler is ineligible to request a TA. Click on the “Next>>” button.

(4) Please note: If an employee has an outstanding TA, the online travel system will not allow any future travel applications to be processed until the outstanding balance has been cleared.

n. The next screen is entitled “Travel Application Summary.”

(1) The preparer should review this summary to check for accuracy. If errors are identified, the preparer may use the header links (General Information, Vacation, BTA/TR, Estimated Expenses, Accounts and Advance) to go back to correct the items. The site will retain all the previously entered information, and the preparer should continue to click on the “Next>>” buttons to return to the summary page.

(2) If the traveler’s department requires authorization signatures for applications, click on the appropriate link. The summary page may then be printed by clicking on the “Print” button at the bottom of the page. The preparer should save this application until the appropriate signatures are obtained by clicking on the “Save Application and Submit Later” button. Please note: the application remains in suspense until signatures are obtained and the preparer submits the application. The preparer/traveler **must** retrieve the application and submit it after signatures are obtained in order to complete the application process.

o. When the summary page has been reviewed for accuracy, the preparer may take one of four actions:

(1) Print—The preparer may print a copy of the application summary for his or her records, or as needed for the department, by clicking on the “Print” button. **Please note that this is an intermediate step**. After printing, the preparer should submit, save, or abort the application.

(2) Submit—If the information listed on the application is correct, the preparer may officially submit the application by clicking on the “Submit This Application” button. The next screen will confirm that the application has been accepted and will assign a unique application number.

(a) The travel system will automatically sends confirmation emails to the preparer, the traveler, the traveler's supervisor, and the primary account managers for all accounts funding the trip.

(b) If the traveler has requested a BTA/TR or TA, he or she will receive an email when the Travel Services office has approved these items.

(c) If a BTA/TR was requested, the travel agency will automatically be notified by email when the Travel Services office approves the BTA.

(3) Void—If the preparer wants to void this application, click on the "Abort" button.

(4) Save—If the application is not ready for submission, the preparer may click on the "Save Application" button. This will place the application in suspense until such time as the preparer/traveler is ready to submit the application. **Please note: the travel application will not be processed until it is submitted, which will affect TR/BTA and travel advance requests.** If the application is saved, the preparer will get a message confirming this action and may either log out or go on to other applications on the travel site.

2. If a preparer/traveler wants to cancel a previously submitted application for any reason, he or she may do so by returning to the "Application Menu," using the steps outlined in 1.a-c described above.

   a. Click on the link entitled "Cancel an Application."

   b. The next screen will list all applications for the traveler that can be cancelled. (If an application involves a BTA/TR or TA, please contact the Travel Services office.) Locate the application to be cancelled and click on the application number.

   c. The next screen will list a summary of the details for that trip. If this is the correct trip, click on the "Cancel This Application" button. If this is not the correct trip, click on the "<<Back" button to return to the list of applications.

   d. When the trip is cancelled, the next screen will confirm that the application has been cancelled. The preparer should print a copy of this confirmation for his or her files.

3. If the preparer/traveler wants to return to a previously saved application, he or she may do so by returning to the "Application Menu," using the steps outlined in 1.a-c described above. Click on the link entitled "Get Saved Unsubmitted Applications."

   Note: If there are problems or questions regarding the application, the preparer/traveler will be notified via email. It is the responsibility of the preparer/traveler to respond to these email notifications as quickly as possible in order to expedite the application.