



# STEPS FOR TRAVEL

## **PRIOR TO MAKING TRAVEL ARRANGEMENTS:**

1. **Delegate Erika DeLeon** the tasks in Workday to process travel. Instructions are attached.
2. Fill out and submit Graduate Student Travel Form. This form is on the G&A website under "Forms"
3. If you wish to be reimbursed, you must secure funding. You may have an advisor who will support your travel. If not, you may apply for the Graduate Travel Award. You must apply for this award well in advance, as funds are limited. If you are granted the award, you will receive an email from the Graduate School. Also, if you are granted the award, the department and HSS will supplement the Graduate award up to \$650.
  - a. Information and how to apply for the award is located on the **Graduate School Website**.  
**Please read the page thoroughly**, as many important rules are there.
4. When speaking at a conference for which there is no registration fee, documentation must be provided to prove attendance.
5. You must purchase commercial airline tickets through **Short's travel management**.
  - a. You should not charge flights to the department CBA account. You should use a personal credit card.  
When creating flight itinerary on line with Shorts, you must create/insert new credit card when processing payment.
6. If two or more students are sharing a room, an itemized receipt showing the split between each person must be obtained. Each person should be able to produce an itemized receipt with their name and payment.
7. You must provide a zero balance hotel invoice with itemized charges.
8. Travel on official University business should not include personal travel.

**\*\*If you are not going to be reimbursed**, you should still submit a Travel Authorization form. It is required for insurance purposes.

## **PROCESS UPON RETURN FROM TRAVEL:**

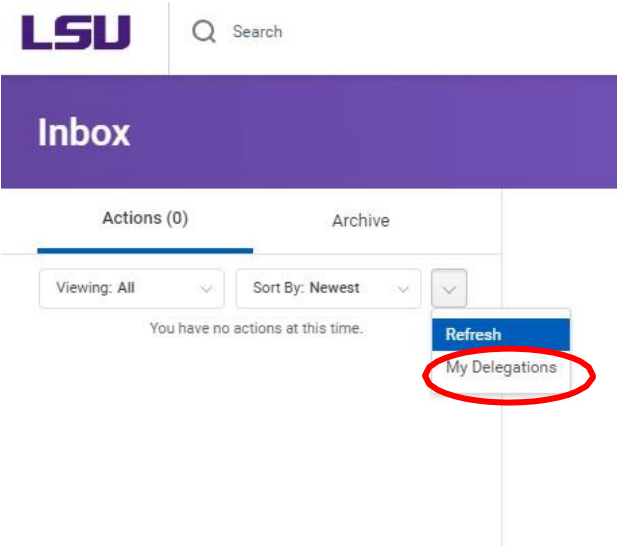
1. You should submit **ALL** receipts for any expenses you expect to be reimbursed for.
  - a. The only exception is that meal receipts are not required for per diem.

Erika will then be able to process an Expense Report in Workday if you have delegated her. You are only able to be reimbursed **AFTER** your travel is concluded. Funds will be disbursed once the Expense Report has been audited and approved by Accounts Payable & Travel.

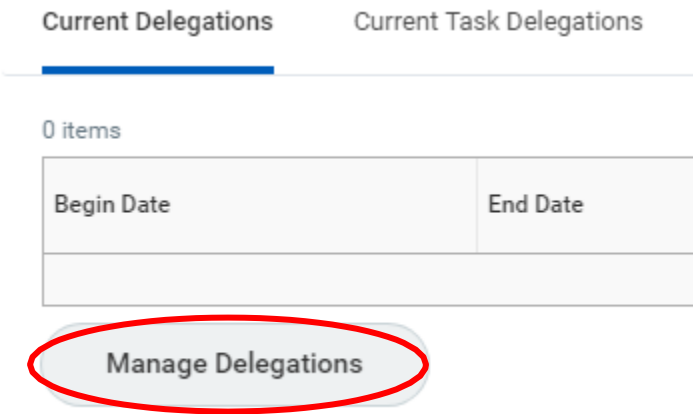
You **SHOULD ALWAYS REFER TO THE PM-13 UNIVERSITY TRAVEL REGULATIONS MANUAL** if you are ever in doubt about something. As always, you may contact Erika if you have any questions.

# How to Delegate in Workday

From your inbox in Workday, select the “My Delegations” option:



Select “Manage Delegations”:



The Next screen should look like this:

The screenshot shows a delegation configuration interface. A red box highlights the date fields: \*Begin Date (01/11/2019) and End Date (06/30/2019). A red arrow points from this box to a text box below. Another red box highlights the \*Delegate field, which contains 'Type: Erika DeLeon'. The \*Delegate field has a red asterisk and a dropdown menu. Below it, 'Use Default Alternate' is checked, and 'Alternate Delegate' is marked with a red asterisk. The 'Start On My Behalf' section has two items: 'X Create Expense Report' and 'X Create Spend Authorization'. The 'Do Inbox Tasks On My Behalf' section has three radio buttons: 'For all Business Processes', 'For Business Process' (selected), and 'None of the above'. Under 'For Business Process', there are two items: 'X Expense Report Event' and 'X Spend Authorization'. The 'Retain Access to Delegated Tasks in Inbox' checkbox is checked. The 'Delegation Rule' section has one item: 'X Expense Approval Delegation Rule-Revised'.

Begin date is current date and end date is end of fiscal year, always 6/30.

**Start on My Behalf:** Enter “Create Expense Report” and “Create Spend Authorization”

**Do Inbox Tasks On My Behalf:** Select “For Business Process” and enter “Expense Report Event” and “Spend Authorization”

Check “**Retain Access to Delegated Tasks in Inbox**”

**Delegation Rule:** Enter “Expense Approval Delegation Rule-Revised”