iTravel+ Booking to Request Process

UTRGV TRAVEL SERVICES OFFICE

iTravel +

Training Learning Objectives

1. Review the Travel Process Overview

2. iTravel+ Request headlines

3. What is Travel (booking) to Request Integration

4. Travel Request Expenses
   - Air, car, hotel (from booking)
   - Meals (GSA integration)

5. Travel Request Attachments and timeline

6. Review Travel Request Alerts

7. Submit and recall Travel Requests

Training Learning Objectives

iTravel+

*Employees/Guest/Prospective

❖Travel

❖Travel Expenses

❖Credit Card reconciliation

❖Business Expense Reimbursements

❖Mileage

❖**Pay an Employee or pay the UTRGV Credit Card**

iShop

Vendors

oPurchase Orders

oNon-Po's

o**Purchase Orders or Payments for a Vendor**
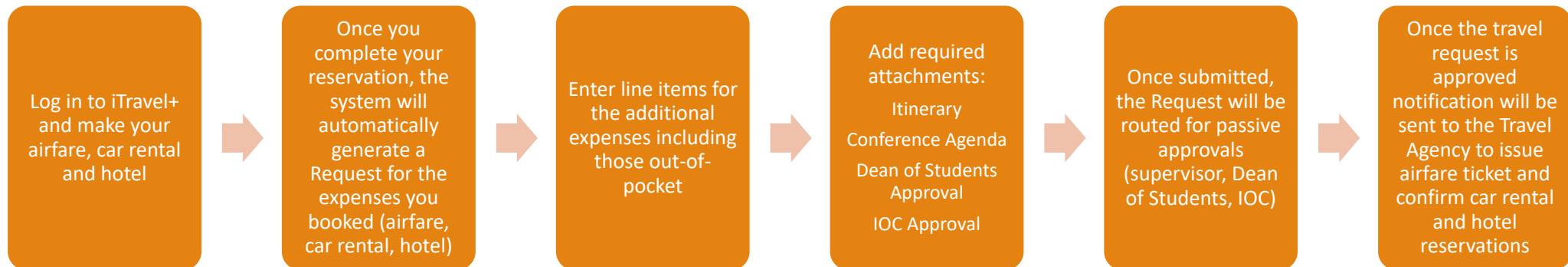
iTravel +

Training Learning Objectives

1. All Travel <u>must</u> have a Travel Request Prior to Travel

2. Consider the Travel Request the official permission to Travel

3. Consider the Travel request the travelers estimated budget

4. Travel Expenses should be claimed against the appropriate Travel request
   ❖ Add on additional expenses to the original travel request
   ❖ Multiple expense reports can be created on the same travel request
   ❖ Upon approval from expense delegate expenses can be added to a trip request as needed.

iTravel +

Travel Process Overview

| Log in to iTravel+ and make your airfare, car rental and hotel | → | Once you complete your reservation, the system will automatically generate a Request for the expenses you booked (airfare, car rental, hotel) | → | Enter line items for the additional expenses including those out-of-pocket | → | Add required attachments: Itinerary Conference Agenda Dean of Students Approval IOC Approval | → | Once submitted, the Request will be routed for passive approvals (supervisor, Dean of Students, IOC) | → | Once the travel request is approved notification will be sent to the Travel Agency to issue airfare ticket and confirm car rental and hotel reservations |

Note: Travel reservations are not confirmed until the travel request is approved, and Travel Requests must be approved prior to the trip start date

iTravel +

Travel Process Overview (without travel reservations)

| Log in to iTravel+ and create a new travel request | → | Enter line items for all expected expenses for the trip including those out-of-pocket | → | Add required attachments:

Itinerary

Conference Agenda

Dean of Students Approval

IOC Approval | → | Once submitted, the Request will be routed for passive approvals (supervisor, Dean of Students, IOC) |
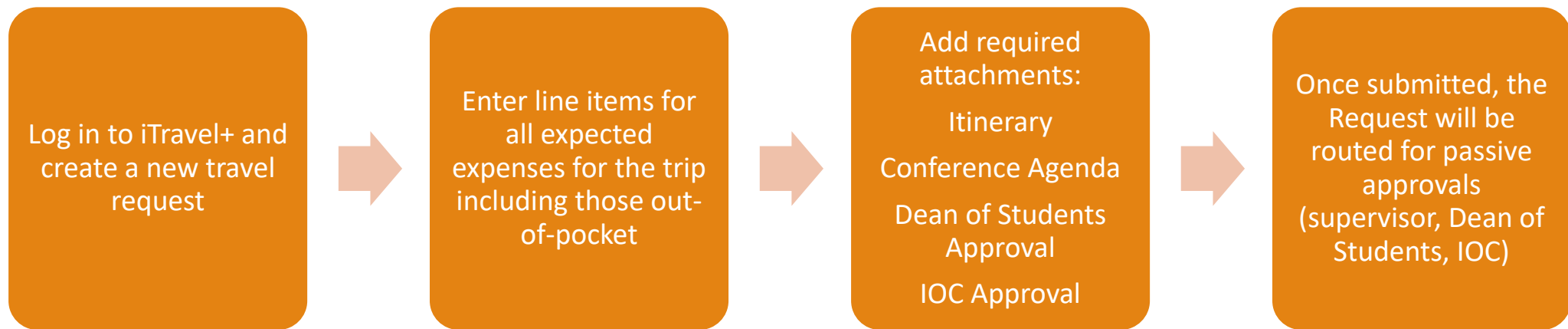
Travel Requests must be approved prior to the trip start date

iTravel +

Travel Requests

- Integrated to the booking module

- Must be approved in order to secure airfare, car rental and hotel reservations that were made in iTravel+

- Required for all trips prior to first day of travel

- Must include detailed information regarding the trip and the benefit to university

- Must include all expected expenses (University paid and out-of-pocket)

- Travel Requests do not encumber funds

- Travel Requests <u>should not</u> be processed for inter-valley / inter-campus mileage reimbursements

- Travel Request Payment Types and suppliers
  - University Paid - Citibank
  - Out-of-Pocket – User's profile

iTravel +

Making air, car and hotel reservations

Once you have selected the Traveler's profile

1. Indicate your departure and destination airport locations

2. Select the departure and return dates and times

3. Indicate if you would like to pick up a car rental

4. Indicate if you would like to reserve a hotel room

5. If you do not need an airfare reservation, click on the Car rental or Hotel icons

Click "Search"

Verify your reservation selection

RESERVATIONS
Monday, February 28, 2022

✈ Flight   **McAllen/Mission, TX** (MFE) to **Houston, TX**

United 1787
Operated by: United

Departure: 07:08 AM	**Confirmation: ALBCT0**
McAllen/Mission Airport (MFE)	Status: Confirmed
Duration: 1 hour, 19 minutes	
Nonstop	

Arrival: 08:27 AM
Houston George Bush Intercontinental Airport (IAH)
Terminal: C

Additional Details

Aircraft: Boeing 737-900	Distance: 316 miles
E-Ticket	
Cabin: ECONOMY (U)	Meal: No Meal Served

1 hr, 27 min layover at Houston George Bush Intercontinental Airport (IAH)

Flight   **Houston, TX** (IAH) to **Chicago, IL** (ORD)

United 0503
Operated by: United

Departure: 09:54 AM	**Confirmation: ALBCT0**
Houston George Bush Intercontinental Airport (IAH)	Status: Confirmed
Terminal: C	
Duration: 2 hours, 46 minutes	
Nonstop	

Arrival: 12:40 PM
Chicago O'Hare Intl Airport (ORD)
Terminal: 1

Additional Details

Aircraft: Boeing 737-700	Distance: 925 miles
E-Ticket	
Cabin: ECONOMY (U)	Meal: Meal at Cost

🚗 Enterprise Car Rental at: Chicago US (ORD)
Pick-up at: Chicago US (ORD)

Pick Up: 12:40 PM *Mon Feb 28*	**Confirmation: 1083393280COUNT**
Pick-up at: Chicago US (ORD)	Status: Confirmed
Number of Cars: 1	Frequent Guest Number: @XXXX2355
	Rate Code: Z2CLX2

Return: 03:39 PM *Fri Mar 4*
Returning to: Chicago US (ORD)

Additional Details

Rate: $53.00 USD daily rate, unlimited miles; $53.00 USD extra daily rate, unlimited miles; $12.54 USD extra hourly ra
Total Rate: $365.52 USD   Corporate Discount: UTS358

Rental Details

Intermediate / Car / Automatic transmission / Air conditioning

---

🛏 Residence Inn Chicago O'Hare
7101 Chestnut St
Rosemont, Illinois, 60018
US
847-375-9000

Checking In: Mon Feb 28	**Confirmation: 95382336**
Room 1, Days 4, Guests 1	Status: Confirmed
	Frequent Guest Number: 127182436

Checking Out: Fri Mar 4

Additional Information

Daily Rate: $126.00 USD   Total Rate: $504.00 USD

Room Details
Room Description: RoomDescriptionCodeRMOC00
Special Instructions: Nonsmoking Earlychckin Foampillows Topfloor

Cancellation Policy
Cancellation Fees may apply
Must Cancel 2 Day(S) Prior To Arrival.

➕ Add to your Itinerary

Friday, March 04, 2022

✈ Flight   **Chicago, IL** (ORD) to **Houston, TX** (IAH)

United 2658
Operated by: United

Departure: 03:39 PM	**Confirmation: ALBCT0**
Chicago O'Hare Intl Airport (ORD)	Status: Confirmed
Terminal: 1	
Duration: 3 hours	
Nonstop	

Arrival: 06:39 PM
Houston George Bush Intercontinental Airport (IAH)
Terminal: C

Additional Details

Aircraft: Boeing 737 MAX 9	Distance: 925 miles
E-Ticket	
Cabin: ECONOMY (S)	Meal: Meal at Cost

1 hr, 40 min layover at Houston George Bush Intercontinental Airport (IAH)

Flight   **Houston, TX** (IAH) to **McAllen/Mission, TX** (MFE)

United 1274
Operated by: United

Departure: 08:19 PM	**Confirmation: ALBCT0**
Houston George Bush Intercontinental Airport (IAH)	Status: Confirmed
Terminal: C	
Duration: 1 hour, 15 minutes	
Nonstop	

Arrival: 09:34 PM
McAllen/Mission Airport (MFE)

Additional Details

Aircraft: Boeing 737-900	Distance: 316 miles
E-Ticket	
Cabin: ECONOMY (S)	

➕ Add to your Itine

Trip Booking Informaiton

Once you have selected and verified your airfare, car rental and hotel selections; you will be prompted to complete the trip booking information:

1. Enter "Trip Name", this will copy to the Travel Request

2. Enter any additional emails where itineraries and trip updates should be sent to

3. Indicate if the traveler has an unused ticket

4. Click "Next"

Travel Request for booked reservations

Once the reservations are made, the system will automatically generate a Travel Request for the reserved expenses

Access / Edit the Request Header

To complete or modify your Request Header:

A. Click on the report name **OR**
B. Click the "Request Details" drop down menu and select "Edit Request Header"

Edit the Request Header

Complete all required fields:
- Traveler Type
- Trip Name (will copy from booking)
- Trip Type
- Travel advisory warning level (for foreign travel only)
- Trip Start Date (will copy from booking)
- Trip End Date (will copy from booking)
- IOC/DOS Confirmation Number
- Business Purpose
- Benefit to University
- Personal Travel selection
- Speedtype
- Trip Justification

Use the comments field to elaborate more on the trip justification such as conference/meeting/event name or how the expenses benefit the intent of the grant/program.

- Once done with changes/updates click "Save"

Copy over changes from Request Header

When a change is made at the header level, apply changes to the request lines by selecting "Copy"
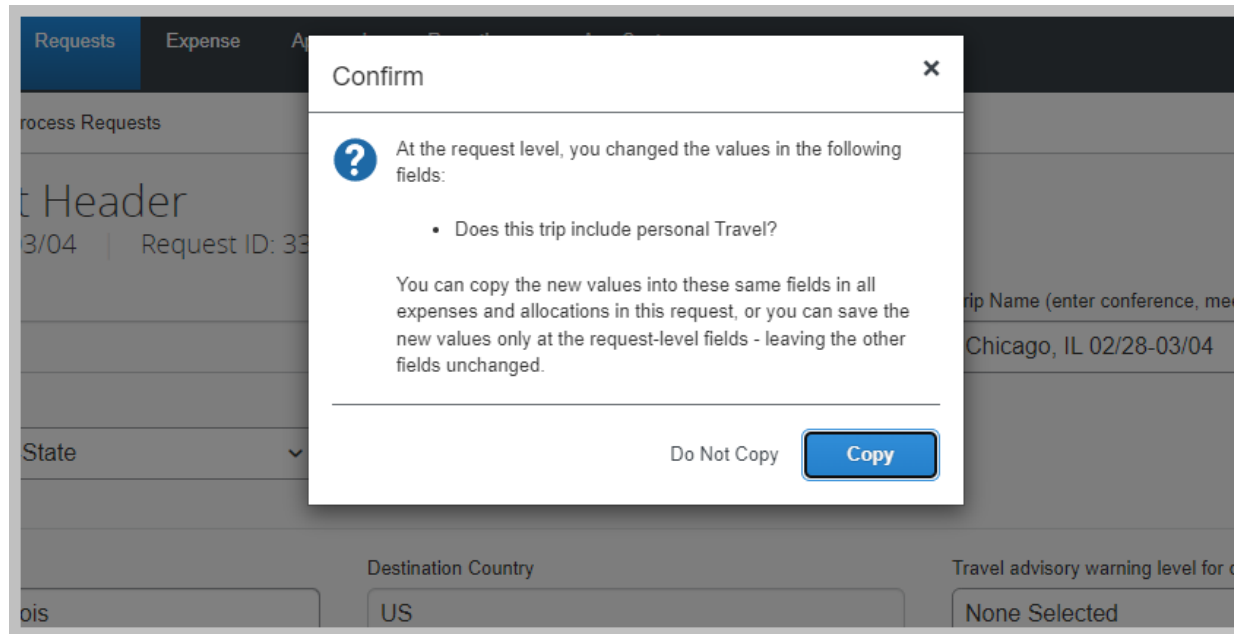
Complete required information for existing expense lines

To complete the required information for lines created from the reservation click on the first line item

Complete required information for existing expense lines

Note that information for your airfare, car rental and hotel is generated based on your booking selections

1. Confirm Reservation details
2. Add expense comments as needed
3. Select payment type for the line item
   - University Paid
   - Out-Of-Pocket
4. Move to the next expense to complete step 1- 3
5. Once you complete all your changes click "Save"

Add remaining expenses

1. Click "Add" to add another expense/line to the travel request
2. Search or Select the expense type

Enter details for selected expense type

Use the justification and comments fields to include expense details, click "Save"

New Expense: Incidentals $50.00
02/28/2022   Cancel   **Save**

Type of Incidental *   Justification *
Luggage   ⌄   Luggage charges to and from Chicago.

Travel Start Date *   Travel End Date *
02/28/2022   📅   03/04/2022   📅

Request Payment Type *   Amount *   Currency *
Out-of-Pocket   ⌄   50.00   US, Dollar   ⌄

Comment
$25 each way on United Airlines

                                                                                    Save   Cancel

iTravel+

Expense line for Meals

The U.S. General Services Administration (GSA) meal rates are integrated to iTravel+ Request
1. Enter expense "Comment"
2. Click "Save"

Expense line for Meals amount

The system will automatically generate the allowable meal amount based on destination and travel dates
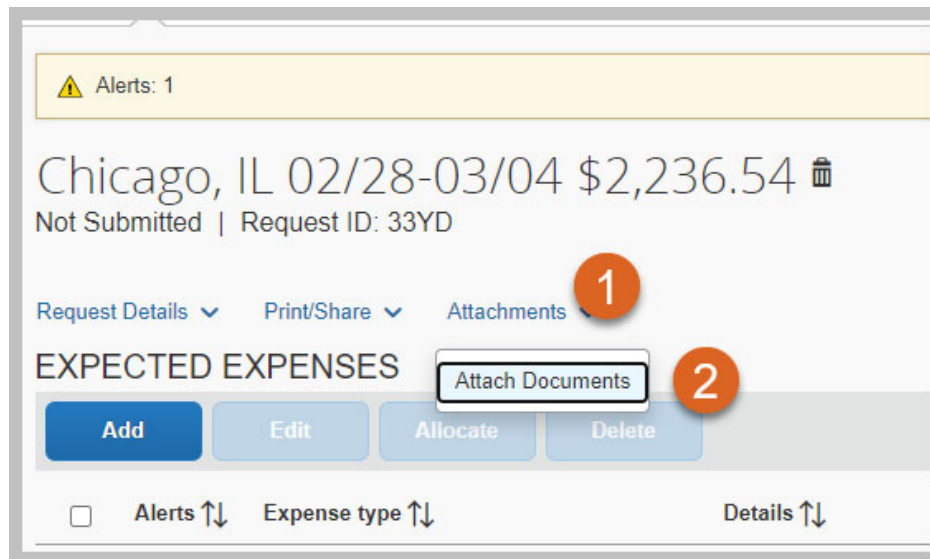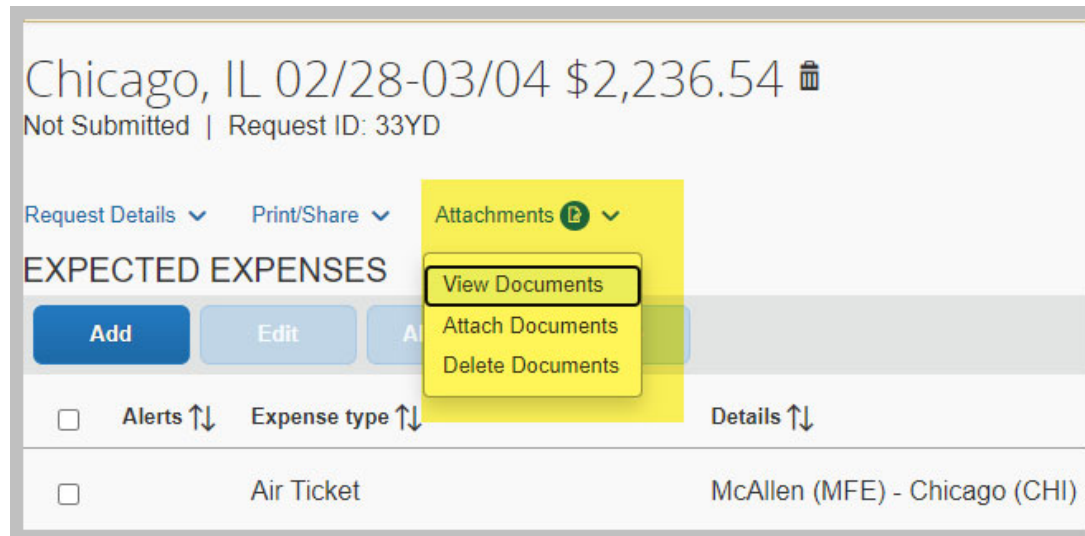
Add attachments

1. Click the "Attachments" drop down menu
2. Select "Attach Documents"
3. Browse for the file
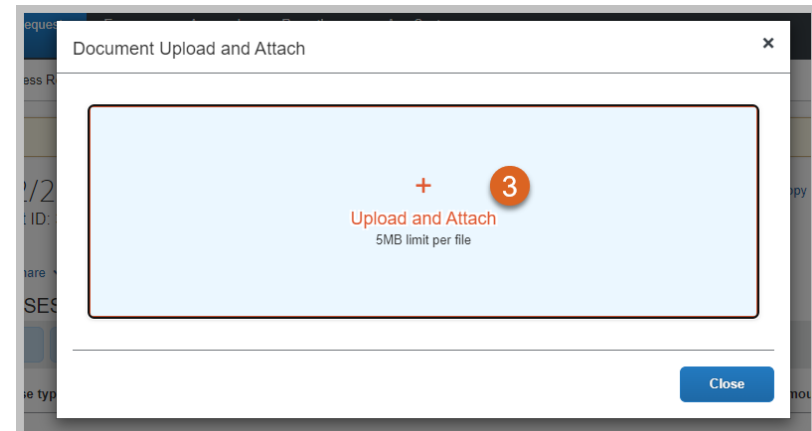
View, add and delete Attachments

Documents attached to Travel Requests may be viewed, attached and deleted through the "Attachments" drop down menu

Delete an expense line from the Request

1. Select the Expense(s) that needs to be deleted
2. Click "Delete"
3. Confirm selection by clicking "Delete from Request"

Delete an expense from the Request

Another option to delete a line from the travel request:

Open the expense line of the item that needs to be deleted
1. Click the "Delete Expense" option
2. Confirm selection by clicking "Delete from Request"

Review all expenses

View Request timeline

1. Click "Request Details"
2. Select the "Request Timeline" option
3. View "Request Timeline"

Review requests alerts

1. *Error messages* must be reviewed and completed prior to submitting the request – marked as [!]
   - An action must be taken on error messages in order to submit the request
2. *Warning messages* will not prevent for the request to be submitted – marked as [⚠]

Alerts: 2

REQUEST

1 ❗ Missing required field: Does this trip include personal Travel?. View

2 ⚠ REMINDER: Please include all estimated travel expenses for this trip request (i.e. meals, parking, etc.). These include University Paid and Out-of-Pocket payment types. View

Chicago, IL 02/28-03/04 $2,236.54 🗑
Not Submitted | Request ID: 33YD

Copy Request   **Submit Request**

iTravel+

Submit Request

Once request alerts have been reviewed, submit the travel request for approval

Submit Request – confirmation and acknowledgement

Read and certify the travel request acknowledgement
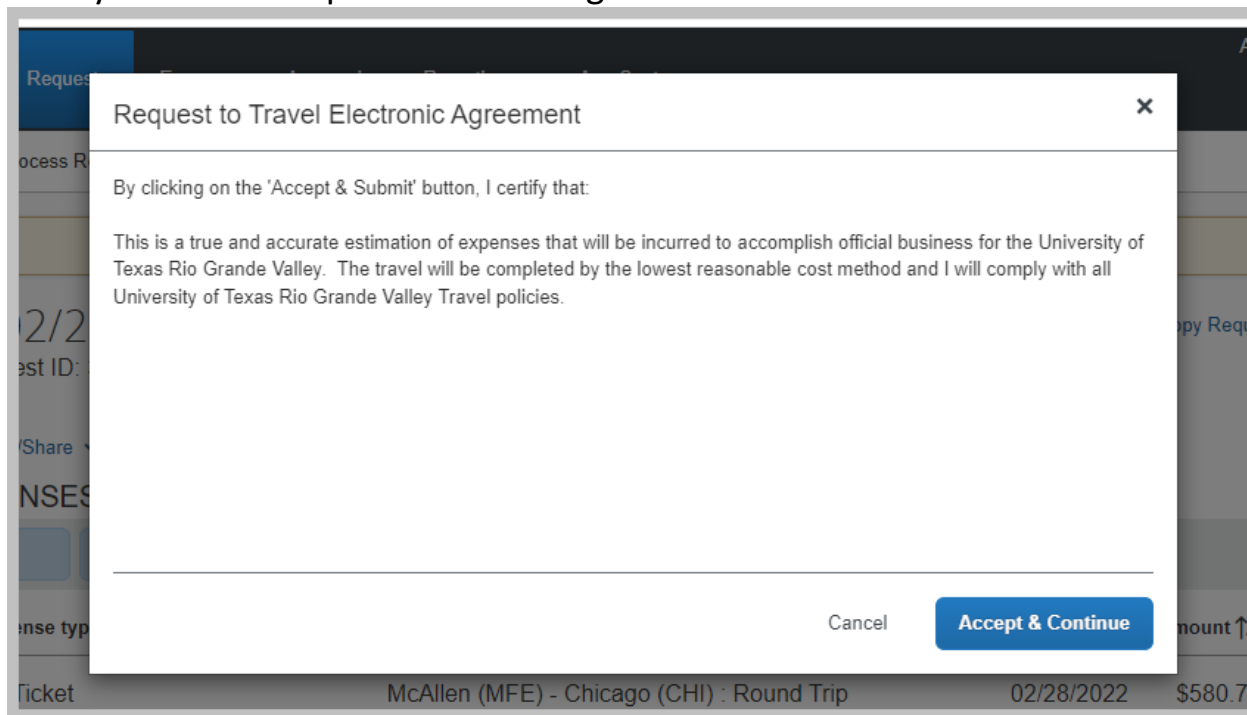
Recall a Travel Request

If changes are needed to the Travel Request you may recall it

Summary

Travel and Request integration

Passive approval in place (on the request) and approval is required to confirm reservations

Travel request should include all expected expenses for the trip

Travel requests do not encumber funds

Travel requests must be approved prior to trip start date

Travel requests should not be submitted for inter-campus/inter-valley mileage

IOC and Dean of Student approvals must be attached to the travel request

iTravel +

Resources

UTRGV Travel Policy ADM 10-602

UTRGV Expense Resource Guide

Dean Of Students

International Oversight Committee

UTRGV Travel Services Office Webpage

iTravel +

Questions

Contact Information

www www.utrgv.edu/procurement/travel

travel@utrgv.edu

956-882-3822 / 956-665-2168

iTravel +

Congratulations!

You have successfully completed this topic