

# iTravel+ Booking to Request Process

---

UTRGV TRAVEL SERVICES OFFICE



# 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

- Purchase Orders
- Non-Po's
- **Purchase Orders or Payments for a Vendor**



# Training Learning Objectives

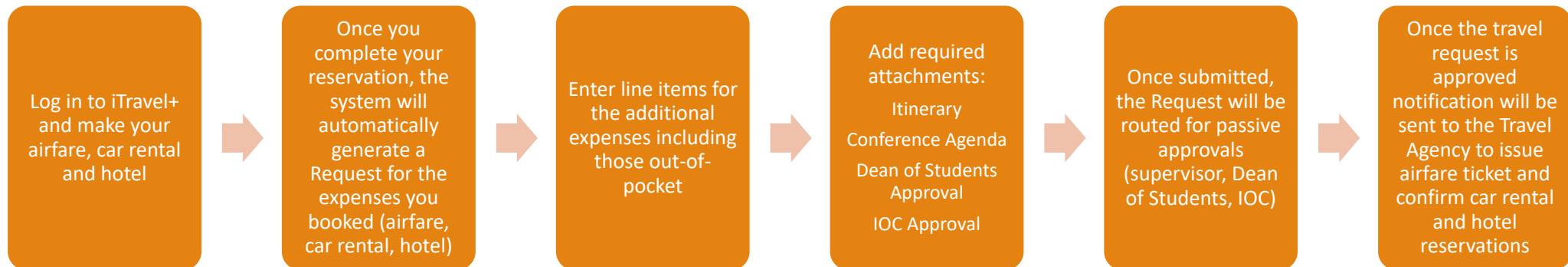
---



1. All Travel must 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.

# Travel Process Overview

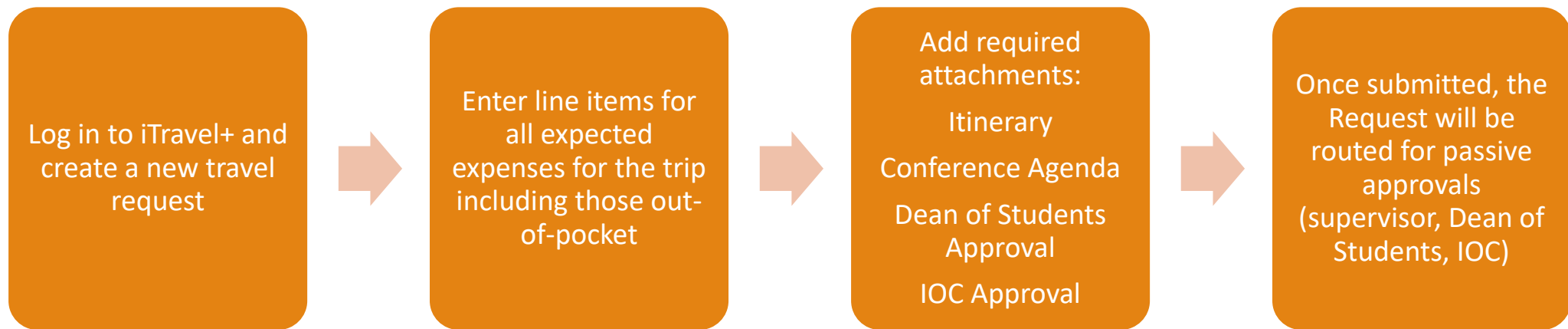
---



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

# Travel Process Overview (without travel reservations)

---



**Travel Requests must be approved prior to the trip start date**

# 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 should not be processed for inter-valley / inter-campus mileage reimbursements
- Travel Request Payment Types and suppliers
  - University Paid - Citibank
  - Out-of-Pocket – User’s profile



# Making air, car and hotel reservations

SAP Concur | Travel | Approvals | Re

UTRGV  
Hello, Gricelda

TRIP SEARCH

Booking | Book for a guest

Flight Search

Round Trip | One Way | Multi City

From: MFE - McAllen/Mission Airport - McAllen/Mission, TX

To: ORD - Chicago O'Hare Intl Airport - Chicago, IL

Depart: 02/28/2022, 09:00 am

Return: 03/04/2022, 05:00 pm

Pick-up/Drop-off car at airport

Find a Hotel

Search within: miles from

Airport

Address

Company Location

Reference Point / Zip Code

Reference Point / Zip Code  
(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

Chicago, IL

Only show results containing:

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 rate  
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) Meal: Meal at Cost

[Add to your itinerary](#)



# Trip Booking Information

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"

The screenshot shows the 'Trip Booking Information' form in the iTravel+ system. The form is divided into two main sections: 'Trip Summary' on the left and 'Trip Booking Information' on the right. The 'Trip Summary' section includes a 'Finalize Trip' button and a list of steps: 'Review Travel Details', 'Enter Trip Information', and 'Submit Trip Confirmation'. The 'Trip Booking Information' section contains several fields and options:


- Trip Name:** A text input field with a red circle '1' next to it. Below the field, it says 'Hotel Reservation at AUSTIN, TX 78723, USA'.
- Trip Description (optional):** A text input field with a red circle '2' next to it. Below the field, it says 'Used to identify the trip purpose'.
- Comments for the Travel Agent (optional):** A text input field with a red circle '3' next to it. Below the field, it says 'Special Requests may incur a higher service fee'.
- Send a copy of the confirmation to:** A text input field with a red circle '2' next to it.
- Send my email confirmation as:** A dropdown menu with options for HTML and Plain-text.
- Do you have an unused ticket in your profile you would like to use? (Required):** A dropdown menu with a red circle '3' next to it.

At the bottom of the form, there is a warning box with a red circle '4' next to it: 'Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation will be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.' Below the warning box are four buttons: 'Display Trip', '<< Previous', 'Next >>', and 'Cancel Trip'.

# Travel Request for booked reservations

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

Alerts: 1



Chicago, IL 02/28-03/04 \$1,551.04  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33YD

[Request Details](#) [Print/Share](#) [Attachments](#)

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Allocate](#) [Delete](#)

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>		Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>		Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80

Estimated Total: \$1,551.04



# 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”

Chicago, IL 02/28-03/04 \$1,551.04 **A** [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33YD

Request Details Print/Share Attachments

Request

**Edit Request Header** **B**

Request Timeline

Audit Trail

**PENSES**

[Allocate](#) [Delete](#)

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>	Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>	Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80

Estimated Total: \$1,551.04

# Edit the Request Header

**Edit Request Header**  
Texas Information Security Forum trip to | Request ID: 333Q

**Default Name of selected Policy \***  
\*Travel Request

**Traveler Type \***  
Employee

**Trip Name (enter conference, meeting, event, training name) \***  
Texas Information Security Forum trip to

**Trip Type \***  
None Selected

**Destination City \***  
US | Austin, Texas

**Destination Country \***  
UNITED STATES (US)

**Travel advisory warning level for destination country (Foreign)**  
None Selected

**Trip Start Date \***  
05/15/2022

**Trip End Date \***  
05/17/2022

**IOC / DOS Confirmation Number**

**Business Purpose \***  
None Selected

**Benefit to University \***  
None Selected

**Does this trip include personal Travel? \***  
None Selected

**Personal Dates of Travel**

**Speedtype \***  
Search by Code

**Justification \***  
Texas Information Security Forum trip to Austin

**Vendor ID**  
0000002022

**Comments To/From Approvers/Processors**

Cancel Save

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

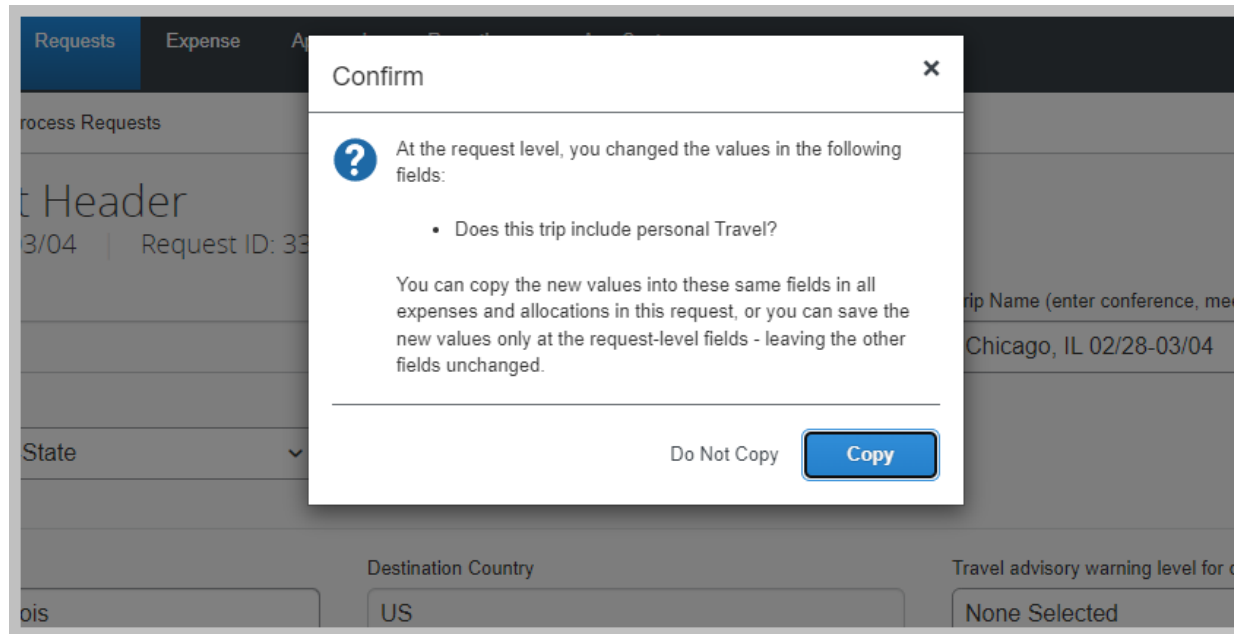
Use the comments field to elaborate more on the trip justification such as conference/meeting/event name or how the expenses benefit the intent of the grant/program.

- 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

⚠ Alerts: 1



Chicago, IL 02/28-03/04 \$1,551.04  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33YD

[Request Details](#) [Print/Share](#) [Attachments](#)

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Allocate](#) [Delete](#)

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>		Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>		Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80

**Estimated Total: \$1,551.04**



# Complete required information for existing expense lines

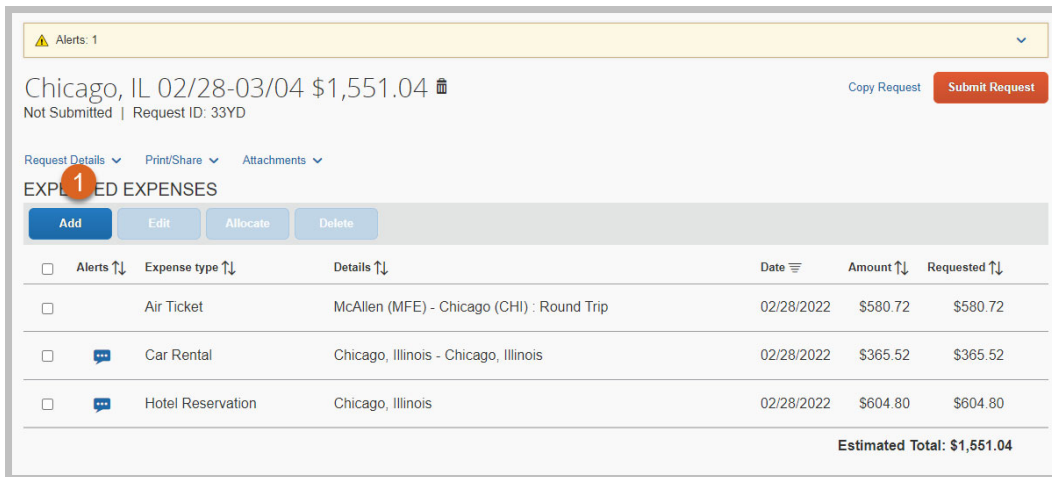
Note that information for your airfare, car rental and hotel is generated based on your booking selections

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”

The screenshot shows a web form for editing an expense line. At the top, the title is "Air Ticket \$580.72" with a trash icon. Below it are "Round Trip" and "One Way" tabs. The "Outbound" section includes: "From" (Miller Intl (Airport - MFE), McAllen, Texas), "To" (Chicago (Area Airports - CHI), Illinois), "Date" (02/28/2022), "Depart at" (07:08 AM), and "Request Payment Type" (University Paid). The "Return" section includes: "Date" (03/04/2022), "Depart at" (03:39 PM), and "Request Payment Type" (University Paid). At the bottom, "Amount" is 580.72 and "Currency" is US, Dollar. A "Save" button is highlighted in yellow.



# Add remaining expenses



Alerts: 1

Chicago, IL 02/28-03/04 \$1,551.04  
Not Submitted | Request ID: 33YD

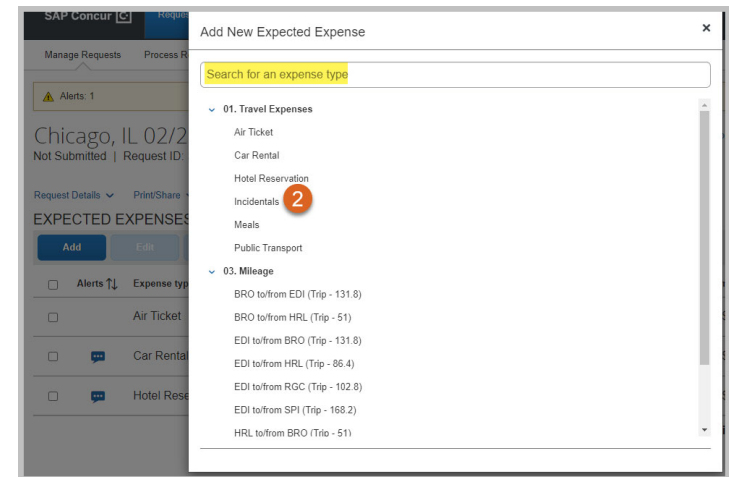
Request Details | Print/Share | Attachments

**EXPENDED EXPENSES**

**Add** Edit Allocate Delete

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>		Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>		Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80

Estimated Total: \$1,551.04



SAP Concur

Manage Requests | Process R

Alerts: 1

Chicago, IL 02/28-03/04 \$1,551.04  
Not Submitted | Request ID: 33YD

Request Details | Print/Share

**EXPENDED EXPENSES**

**Add** Edit

**Add New Expected Expense**

Search for an expense type

- 01. Travel Expenses
  - Air Ticket
  - Car Rental
  - Hotel Reservation
  - Incidentals
  - Meals
  - Public Transport
- 03. Mileage
  - BRO to/from EDI (Trip - 131.8)
  - BRO to/from HRL (Trip - 51)
  - EDI to/from BRO (Trip - 131.8)
  - EDI to/from HRL (Trip - 86.4)
  - EDI to/from RGC (Trip - 102.8)
  - EDI to/from SPI (Trip - 168.2)
  - HRL to/from BRO (Trip - 51)

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 Cancel Save

02/28/2022

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



# 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"

New Expense: Meals \$0.00 Cancel Save

02/28/2022


Travel Start Date	Travel End Date	
<input type="text" value="02/28/2022"/>	<input type="text" value="03/04/2022"/>	
Destination City	Amount will calculate when you save	Currency
<input type="text" value="US"/> <input type="text" value="Chicago, Illinois"/>	<input type="text"/>	<input type="text" value="US, Dollar"/>
Request Payment Type	<b>1</b>	Comment
<input type="text" value="Out-of-Pocket"/>		<input type="text" value="Meals for trip."/>

**2** Save Cancel



# Expense line for Meals amount

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





Chicago, IL 02/28-03/04 \$2,236.54  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33YD

[Request Details](#) [Print/Share](#) [Attachments](#)

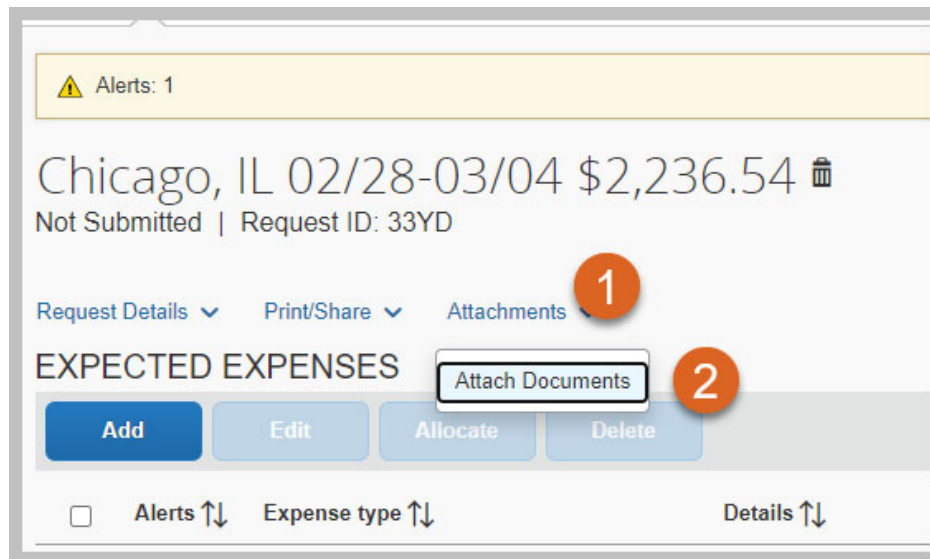
### EXPECTED EXPENSES

[Add](#) [Edit](#) [Allocate](#) [Delete](#)

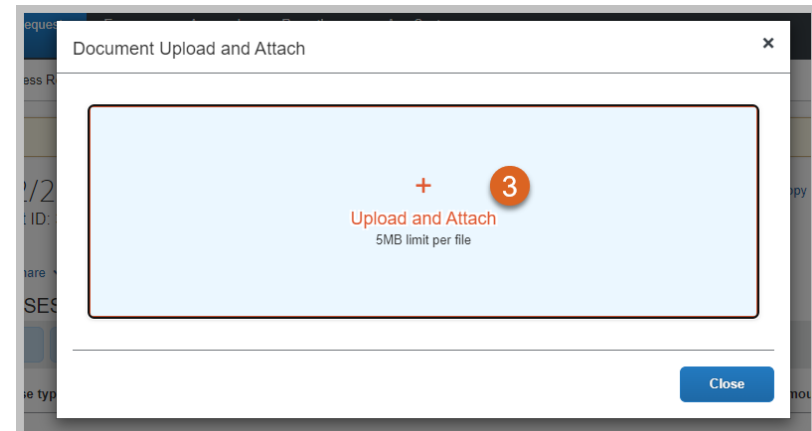
<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>		Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>		Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80
<input type="checkbox"/>		Incidentals	Luggage charges to and from Chicago.	02/28/2022	\$50.00	\$50.00
<input type="checkbox"/>		Meals	Chicago, Illinois	02/28/2022	\$355.50	\$355.50



# Add attachments

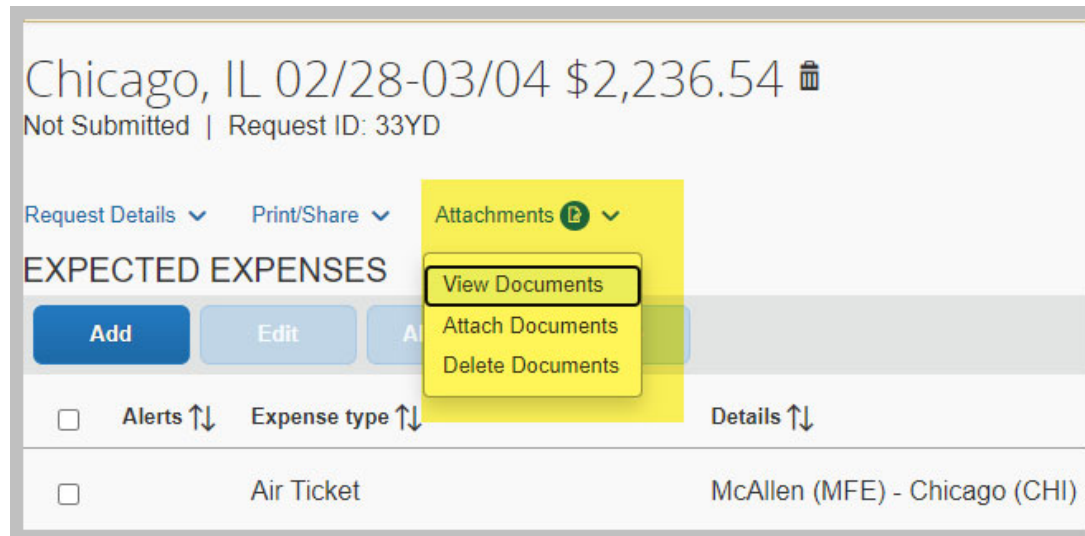


1. Click the "Attachments" drop down menu
2. Select "Attach Documents"
3. Browse for the file



# View, add and delete Attachments

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



The screenshot displays a travel request interface for "Chicago, IL 02/28-03/04" with a total amount of "\$2,236.54" and a status of "Not Submitted | Request ID: 33YD". Below the header, there are three dropdown menus: "Request Details", "Print/Share", and "Attachments". The "Attachments" menu is open, showing three options: "View Documents", "Attach Documents", and "Delete Documents". Below the menu, there is a section titled "EXPECTED EXPENSES" with three buttons: "Add", "Edit", and "All". Below this, there are three columns of controls: "Alerts" with a checkbox and up/down arrows, "Expense type" with up/down arrows, and "Details" with up/down arrows. The first row of the expense table shows a checkbox, the text "Air Ticket", and the route "McAllen (MFE) - Chicago (CHI)".

# Delete an expense line from the Request

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

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete 2

<input type="checkbox"/>	Alerts <span>↑↓</span>	Expense type <span>↑↓</span>	Details <span>↑↓</span>	Date <span>≡</span>	Amount <span>↑↓</span>	Requested <span>↑↓</span>
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>	<span>⋮</span>	Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>	<span>⋮</span>	Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80
<input type="checkbox"/>	<span>⋮</span>	Incidentals	Luggage charges to and from Chicago.	02/28/2022	\$50.00	\$50.00
<input type="checkbox"/>	<span>⋮</span>	Meals	Chicago, Illinois	02/28/2022	\$355.50	\$355.50
<input type="checkbox"/>	<span>⋮</span>	Conference/Registration fee		02/28/2022	\$200.00	\$200.00
<input checked="" type="checkbox"/>	<span>⋮</span>	Incidentals	Parking at hotel "Residence Inn" by Marriott	02/28/2022	\$80.00	\$80.00

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

Confirm Delete ×

⚠ These Expected Expenses will be permanently deleted. 3

Do Not Delete 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"


The screenshot shows a travel request form for an expense line item. At the top, the item is labeled "Incidentals \$80.00" with a date of "02/28/2022". To the right of the amount is a trash can icon, which is circled in red and labeled with the number "1". Below this, there are several fields: "Type of Incidental\*" with a dropdown menu set to "Parking"; "Justification\*" with the text "Parking at hotel 'Residence In'"; "Travel Start Date\*" with the date "02/28/2022"; "Travel End Date\*" with the date "03/04/2022"; "Request Payment Type\*" with a dropdown menu set to "University Paid"; and "Amount\*" with the value "80.00". There is also a "Comment" field at the bottom.

The screenshot shows a "Confirm Delete" dialog box overlaid on the travel request form. The dialog box has a title bar with "Confirm Delete" and a close button. Inside, there is a warning icon (a yellow triangle with an exclamation mark) and the text "This expense will be permanently deleted." Below this text are two buttons: "Do Not Delete" and "Delete from Request". The "Delete from Request" button is circled in red and labeled with the number "2".



# Review all expenses

Alerts: 1







Chicago, IL 02/28-03/04 \$2,236.54  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33YD

[Request Details](#) [Print/Share](#) [Attachments](#)

**EXPECTED EXPENSES**

[Add](#) [Edit](#) [Allocate](#) [Delete](#)


<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>		Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>		Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80
<input type="checkbox"/>		Incidentals	Luggage charges to and from Chicago.	02/28/2022	\$50.00	\$50.00
<input type="checkbox"/>		Meals	Chicago, Illinois	02/28/2022	\$355.50	\$355.50
<input type="checkbox"/>		Conference/Registration fee		02/28/2022	\$200.00	\$200.00
<input type="checkbox"/>		Incidentals	Parking at hotel "Residence Inn" by Marriott	02/28/2022	\$80.00	\$80.00

**Estimated Total: \$2,236.54**



# View Request timeline

Alerts: 1

Chicago, IL 02/28-03/04 \$2,236.54  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33YD

Request Details **1** [Print/Share](#) [Attachments](#) **2**

Request PENSES

[Edit Request Header](#) [Edit](#) [Allocate](#) [Delete](#)

**Request Timeline** **2**

Audit Trail

Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
<input type="checkbox"/> Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72

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

### Request Timeline

Chicago, IL 02/28-03/04 | \$2,236.54

Approval Flow [Edit](#) **3**



Supervisor Approval  
Rangel, Maggie D.


#### Request Summary

EXPENSE COMMENT Car Re  
Saavedra Alvarez, Gricelda 02/1  
Confirmation# 95382336





# 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](#)

# Submit Request

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

Manage Requests | Process Requests

Alerts: 1

Chicago, IL 02/28-03/04 \$2,236.54 Copy Request Submit Request

Not Submitted | Request ID: 33YD

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

[Add](#) [Edit](#) [Allocate](#) [Delete](#)

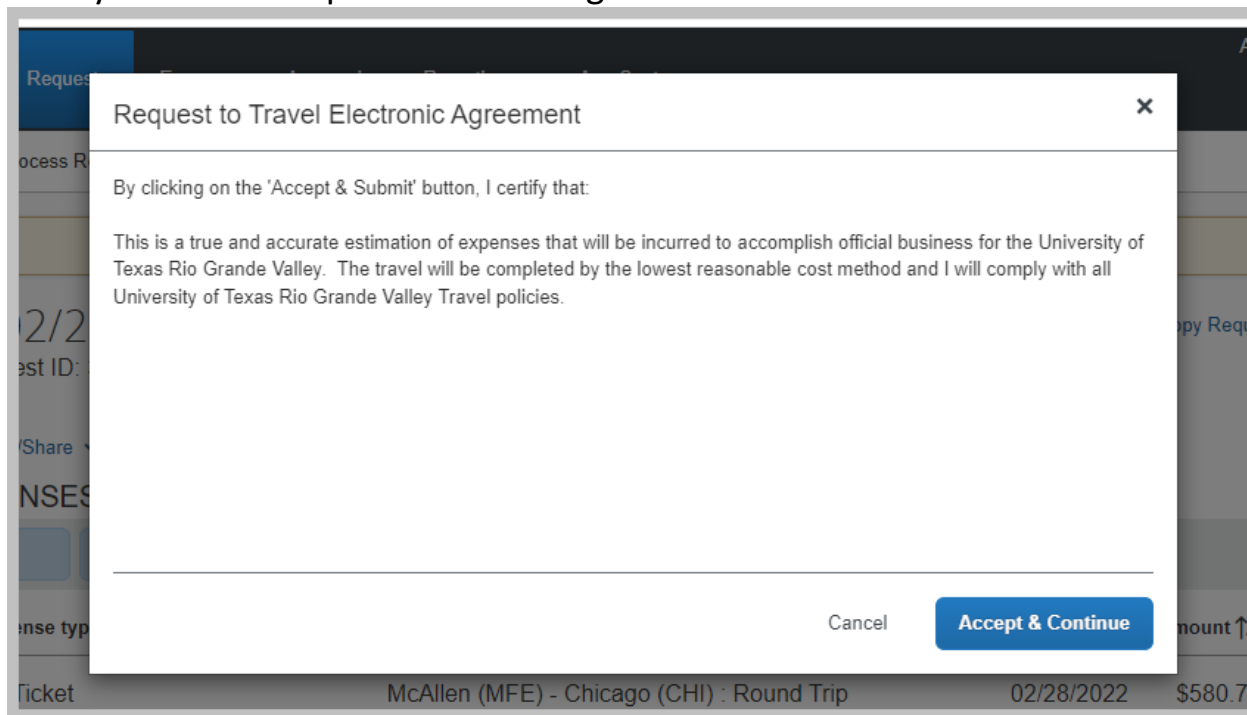
<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
<input type="checkbox"/>		Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52
<input type="checkbox"/>		Hotel Reservation	Chicago, Illinois	02/28/2022	\$604.80	\$604.80
<input type="checkbox"/>		Incidentals	Luggage charges to and from Chicago.	02/28/2022	\$50.00	\$50.00
<input type="checkbox"/>		Meals	Chicago, Illinois	02/28/2022	\$355.50	\$355.50
<input type="checkbox"/>		Conference/Registration fee		02/28/2022	\$200.00	\$200.00
<input type="checkbox"/>		Incidentals	Parking at hotel "Residence Inn" by Marriott	02/28/2022	\$80.00	\$80.00

Estimated Total: \$2,236.54



# 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

Manage Requests    Process Requests

Alerts: 1

Chicago, IL 02/28-03/04 \$2,236.54  
Pending Supervisor Approval | Request ID: 33YD

More Actions **Recall**

- Cancel Request
- Copy Request

Request Details    Print/Share    Attachments

### EXPECTED EXPENSES

Alerts	Expense type	Details	Date	Amount	Requested
	Air Ticket	McAllen (MFE) - Chicago (CHI) : Round Trip	02/28/2022	\$580.72	\$580.72
	Car Rental	Chicago, Illinois - Chicago, Illinois	02/28/2022	\$365.52	\$365.52



# 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



# Resources

---

UTRGV Travel Policy ADM 10-602

UTRGV Expense Resource Guide

Dean Of Students

International Oversight Committee

UTRGV Travel Services Office Webpage





# Questions

---



# Contact Information

---



[www.utrgv.edu/procurement/travel](http://www.utrgv.edu/procurement/travel)



[travel@utrgv.edu](mailto:travel@utrgv.edu)



956-882-3822 / 956-665-2168

# Congratulations!

---

You have successfully completed this topic

