Commonwealth University
TM – Travel Management
"For Insurance Purposes Only"
Reporting

Log into the portal and access travel management.

Follow the steps listed in the document "Create Travel Request" until the point that you have entered the General Data and Destination information.

Click on "Enter Estimated Costs"

- Estimated Costs – Enter details by clicking on "Enter Estimated Costs"
    - Populate the appropriate expense type category and click on "Calculate"
    - When everything looks correct, click on "Accept" to return to the main screen

Estimated Costs

Calculate

Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	384.00	USD
Meals/Subsistence	213.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	**697.00**	**USD**

‹ Previous Step   Accept | Save Draft

The system will automatically estimate the cost for lodging and meals based on your trip duration and trip location (trip region). You can override these amounts if necessary.

(minimum = $.01)

- o   Enter the estimated costs for the trip, remember to adjust meals for any provided and if there is not a hotel cost reduce this to $.01; (Hotel and Meal amounts must be a minimum of $.01);
- o   "For Insurance Purposes" the Travel Approval Request (TAR) sum must be zero. To achieve this the traveler will enter a negative dollar amount under **"Z: Unfunded Travel Costs";**

- **Example: If trip total is cost is $200.00, enter $ -200.00, see below;**

Estimated Costs

Calculate

Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	150.00	USD
Meals/Subsistence	50.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	**200.00**	**USD**

Estimated Costs

Calculate

Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	150.00	USD
Meals/Subsistence	50.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	200.00-	USD
Sum	**0.00**	**USD**

Click "Accept" to save and return to the main screen;

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If all looks good on the below screen, you can **Save a Draft** of the Travel Request or **Save and Send it for Approval**. Click on the appropriate radio button and then the Save button at the bottom of the screen (this button will change based on the radio button you select).

If you wish to display or print the request, click on the button Display Request Form.

The below screen will then appear acknowledging that the Travel Request was saved and provide the Trip Number for tracking and Enterprise (if necessary).

You have the option to display or print the request form again at this point. Please note the workflow approval log does not appear on the form until the Travel Request is Saved.

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This trip will now be listed on the "My Trips and Expenses" overview screen.

Note that completed trips listed will prompt for creation of an expense report

From here, you can Display/Print the Travel Request form at any time. The workflow approval log on the form will show you where your trip is in the approval process. You can also Change, Copy, or Delete the Travel Request, Add Attachments, Display the History, and Create the Expense Report from these screens.