

PROTRAV TRIP CREATION DOCUMENT

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Create New Trip

A trip should be created for anyone traveling on behalf of the University, regardless if the University is funding the trip or a 3rd party is paying the expenses. Registering a trip will ensure that there is necessary information to get ahold of a traveler should the need arise due to an emergency situation.



Click Create new trip on the sidebar to the left.

You may create a trip for any UI employee, student or non-ui employee without them being listed under your “my Travelers” section.

Principal Traveler

Who is Traveling: Indicate whether the traveler is yourself or another individual. When “Myself” is selected, it will enter you as the traveler.

A screenshot of the 'Create a Trip' form. The form has three steps: '1 Trip Basics', '2 Funding', and '3 Submit'. The 'Principal Traveler' section is active. It has two radio buttons: 'Myself' (selected) and 'Someone else'. Below the radio buttons is a text input field for 'Name (Department | Location)' with the value 'John A Doe (VPFO-Accounts Payable & Travel | 202 PCO)'. A note '* denotes required fields' is visible in the top right corner.

If you select someone else, you may search for UI Faculty/Staff, UI student or Non-ui Traveler. If searching for UI employee or student, you may search by their HAWK ID.

A screenshot of the 'Principal Traveler' form. It has two radio buttons: 'Myself' and 'Someone else'. Below the radio buttons is a section titled 'Add the principal traveler for this trip.' There are two search options: 'Find traveler by type and name' and 'Find traveler by HawkID'. The 'Find traveler by type and name' option has a dropdown menu for 'Traveler Type' with options: 'UI Faculty/Staff', '- select -', 'UI Faculty/Staff', 'UI Student', and 'Non-UI Traveler'. The 'Find traveler by HawkID' option has a text input field for 'HawkID' and a 'Search HawkIDs' button. There are 'Add traveler' buttons for both search options. At the bottom, there is a text input field for 'Name | Department | Address' and a note '* Please select the individual traveling on University of Iowa business.'.

Click “Add traveler”, a list of all who match the criteria you listed will be returned. If there is only one result, the name will automatically populate.

* denotes required fields

 Principal Traveler

Myself Someone else

Name (Department | Location)

James D Doe (Cend-Cad-Research Engineering | 127 NADS)

John A Doe (VPFO-Facilities Management | 105 MSSB)

If more than one result, select the appropriate traveler by clicking on the radio button to the left of their name.

Trip Essentials — Purpose of Travel

Enter Trip Description, Purpose of Travel, select Individual or Group travel and Type of travel. Comments may be added but are not required.

 Trip Essentials

Trip Description *

Purpose of travel *

Type of travel *

Trip comments

Justification for Business Travel:

Based upon purpose of travel, the Justification for Business Travel will be required. The options for justification include; Attendee/Participant, Presenter, Support, or Other.

 Trip Essentials [help](#)

Purpose of travel *

Justification for Business Travel *

Based on your purpose of travel, what capacity are you representing the University in your business travel?

Trip comments

Itinerary Destination — Where and when travel will take place

Enter the Destination Country, state and city. If the desired city is not listed, select other and type the city name in Other City box. Enter the traveler's departure and return dates.

Itinerary Destinations

* Please enter at least one destination

Country
United States

State
Iowa

City
Other

Other City

Departure date
05/10/2011

Return date

Save destination

City, State	Country	Arrival	Departure	Advisory
-------------	---------	---------	-----------	----------

Click Save Destination.

Trip Destinations

+ Add a destination

City, State	Country	Arrival	Departure	Advisory
Anchorage [Incl Nav Res], Alaska	United States	05/17/2011	05/20/2011	Edit Delete

To add additional destinations to this trip, select add a destination. Be sure to not use the same travel dates as already saved. For example, the traveler is in Alaska 5/17-5/20, then going to California 5/20-5/22.

Click Save destination. To add more destinations, continue to select Add a destination. Once all destinations have been added scroll to the next section.

Trip Destinations

+ Add a destination

* Please enter at least one destination

Country
United States

State
Alaska

City
Other

Other City

Departure date
05/17/2011

Return date

Save destination

City, State	Country
Anchorage [Incl Nav Res], Alaska	United States

Originating Location — For UI employee travel to Iowa City

When creating a trip for a UI employee, if the destination of Iowa City, IA has been entered, the section below will appear which requests additional required information.

≡ Originating Location [help](#)

* Originating location is required when the trip destination is Iowa City and the traveler is a UI employee.

Country
United States

State
Iowa

City
- select a city -

Justification

Save location

City, State Justification Actions

Once the information has been entered, select Save Location.

International destinations with travel advisories

If a trip is being created to a destination that has been issues a travel warning or alert by the US State Department, a link will appear that the user may click to review the travel warning or alert.

📖 Trip Destinations [help](#)

* Please enter at least one destination

Departure date Return date
10/17/2011 10/19/2011

Country
Afghanistan

⚠️ [State Department Advisory](#)

City
Kabul

Once the user clicks on the link, a window will open with the complete text of the advisory which includes additional links to the US State Department website. This advisory may be accessed through the trip summary after the trip has been created.

Advisory e-mail notifications

If a new advisory is issued after a trip has been created, an e-mail notification will be sent to the traveler and workflow approvers announcing details of the new advisory. If there was an advisory at the time the trip was created, but now is canceled, an e-mail notification will be sent to the traveler and workflow approvers announcing it has been canceled.

Personal/Business Travel

The personal travel section has been added to all trips set up in ProTrav for UI Faculty/Staff. In this section, you will record your actual business travel dates.



 Personal Travel [help](#)

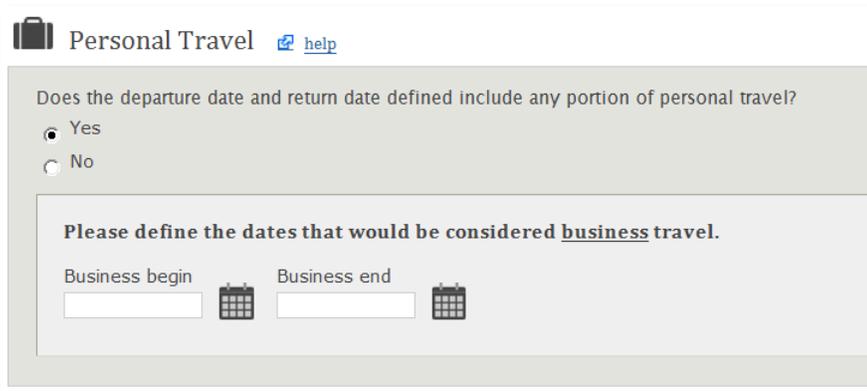
Does the departure date and return date defined include any portion of personal travel?

Yes

No

If the user clicks no, move on to the next section of the trip set up.

If the user clicks yes, enter the dates of the **business** travel only.



 Personal Travel [help](#)

Does the departure date and return date defined include any portion of personal travel?

Yes

No

Please define the dates that would be considered business travel.

Business begin  Business end 

Once the dates are selected, scroll down to the next section in the trip creation process.

Destination Address — where the traveler will be staying.

If it is known at the time the trip is being created, it is requested you enter where the traveler will be staying. In case of an emergency, it will be known where they are.

📍 Destination Addresses (optional)

Add a destination address.
Addresses assist the UI in locating travelers during an emergency.

Associated Destination
- select a destination -

Type
- select -

Address Line1

Address Line2

Country
United States

State
- select -

City

Save address

If the traveler is staying multiple places, you may enter additional addresses. Click Add an address, then save address each time you wish to add.

📍 Destination Addresses [help](#)

+ Add an address

Parent Dest	Type	Address	City, State Country	Actions
Allentown/Easton/Bethlehem, Pennsylvania	Hotel	Marriott 123 Sleepy Lane	Allentown/Easton/Bethlehem, Pennsylvania United States	Delete
Allentown/Easton/Bethlehem, Pennsylvania	School	Elementary School of PA 123 Education Street	Allentown/Easton/Bethlehem, Pennsylvania United States	Delete
Moab, Utah	Hotel	Marriott 456 Sleepy Lane	Moab, Utah United States	Delete

Traveler Contact Information

Contact information directly to the traveler or other designated contact

This information is being requested in case of an emergency, departments may get a hold of the traveler quickly.

Click Add contact

📞 Traveler Contact Information (optional)

+ Add contact

Name/Method	Type	Number/Address
-------------	------	----------------

The screen will open to an editable state. Enter the traveler your contact information or Other/Personal contact information it may be a cell phone or e-mail address. Click Save contact.

Traveler Contact Information (optional)

+ Add contact

How can we get ahold of the traveler during this trip?

Contact type

Other/Personal

- select -

Self/Traveler

Other/Personal

Contact method

- select -

Number / Email

Save contact

Click Add contact if there are multiple points of contact for the traveler.

Traveler Contact Information (optional)

+ Add contact

Name/Method	Type	Number/Address	
Self (Cell Phone)	Self/Traveler	319-555-9525	Delete

Passport

This information is only requested for UI faculty/Staff or Students traveling internationally

Click Add passport to provide the Issuing Country, Passport number, and date of issue. ProTrav will default the expiration date to 10 years past the date of issue. Once this information has been entered, it will default into future trips up to the expiration date of the passport. If the traveler has passports for multiple countries, they may all be added to the traveler profile. Click save passport. If you need to add another passport, click Add passport.

Passport Information (optional)

+ Add passport

Input passport information.

Issuing Country

United States

Passport number

Issue date

Expiration date

Save passport

Additional Considerations

Select whether the trip is being funded by University of Iowa funds or not. If yes is selected the user clicks continue, they will be taken to the Funding screen to enter the funding MFK and Cash Advance information if one is needed. If no is selected, you will be taken to the trip summary screen to review the trip information entered in Step 1.

Additional Considerations

1. * Is the University of Iowa funding all or part of this trip? (This includes grants that are administered through the University accounts)

Yes

No

Funding MFK

Enter the funding information for this trip

You may only enter one funding MFK during trip set up. If multiple sources are funding this trip, you may add them at the time you are claiming out of pocket reimbursement to the traveler.

You may add the funding MFK by utilizing your favorites , enter a funding MFK and add it to your favorites, or hand type the funding MFK into the spaces. Once the MFK is populated, click Save MFK 

 Funding MFK

Please input the MFK for this trip.

 	FND	ORG	DEPT	SDEPT	GRNT/PRGM	IACCT	OACCT	DACCT	FNC	CCTR	<input type="button" value="Save MFK"/>
	<input type="text"/>	6027	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					

MFK

Travel Cash Advance

Travel cash advances are used to cover miscellaneous expenditures that will be incurred while in travel status (taxi, meals, tips, etc.). An approved Request for Travel (ProTrav Trip Request), authorizing the advance amount and funding must be submitted to the Travel Department in order to obtain a cash travel advance.

Travel cash advances will be limited to domestic travel over 14 days, all foreign travel, and emergencies. The advance amount is limited to \$60 the first day in travel status and \$20 for each additional day. The standard amount will default in based on the trip dates. If a different amount is requested, an email will need to be sent to protrav@uiowa.edu requesting the different amount. If traveling internationally, the user will type in the amount requested and provide justification.

Travel cash advance checks can be picked up at the Travel Department five working days prior to the start of the trip. Questions can be directed to protrav@uiowa.edu.

Click **Add cash advance**



Cash Advance [help](#)

Would you like to add a cash advance?

+ Add cash advance

Amount

Payment Method

Justification (if required)

Actions

If you do not wish to request a cash advance, skip this step.

Review trip details and submit

This is a summary view of the trip information entered in steps 1 and 2. If all the information is correct, click Submit Trip. If any corrections need to be made click "Prev" to the screen in which the change needs to be made. Edit or delete and re-enter the information and then click Continue until you are back to the Review Trip Details panel.

There is also a link so the user may print the itinerary of the trip.

Review Trip Details & Submit

[Print the itinerary](#)

Principal Traveler
Name: Jane Doe
Department: Testing
Campus Address: 123 Testing

Trip Essentials
Trip Description: Trip set up
Purpose of Travel: Conference/Professional Development
Type of Trip: Individual
Trip Comments:

Trip Destinations

City, State	Country	Arrival	Departure	Advisory
Las Cruces, NM	United States	05/18/2011	05/21/2011	

Destination Addresses

Parent Dest	Type	Address	City, State Country
Las Cruces, NM	Hotel	Marriott 123 Lark Lane	Las Cruces, NM USA

Traveler Contact Information

Name	Contact Method	Phone Number/Email Address
Sally Doe	Email	xyz@noemail.com
Jane Doe	Cell Phone	319-555-5555

Funding Information

MFK

240 - 05 - 0310 - 00000 - 50508250 - 6026 - 000 - 00000 - 60 - 0000

Cash Advance Amount	Payment Method
120.00	Direct deposit

[Submit Trip](#) [Prev](#) | [Cancel](#)

STEP Registration

Users have the option to register their international travel at the State Department's Smart Traveler Enrollment Program (STEP) through a link in ProTrav.

Once the user clicks the orange button, a new window or tab will open to the US Department of State's website to enter the trip information. For more information about the STEP program, click [here](#).

The screenshot shows a web interface for 'STEP Registration'. At the top, there is a header with a menu icon, the text 'STEP Registration', and a 'help' link. Below the header is a grey box with the question 'Would you like to register this trip with the U.S. State Department's Smart Traveler Enrollment Program (STEP)?' and an orange button labeled 'Go to STEP Registration site'. The main content area is titled 'Create a trip wizard' and is split into two columns. The left column, 'Steps', lists four steps: 1. Enter trip details - complete, 2. Enter funding information - complete, 3. Submit trip - complete, and 4. Submit to workflow. The right column contains a success message: 'Your trip has been created successfully'. It includes tracking numbers, a 'Trip ID: 290', a link to 'Add attachments', and a note about documentation requirements. Below this is another success message: 'Your transaction must now be routed in Workflow', followed by instructions to click the 'Continue with Workflow' button, which is a grey button at the bottom of the right column.

Submit to Workflow

Electronic pre-trip approval through Workflow may or may not be required by the funding department.

If the funding department does not require electronic approval, and there is no cash advance requested, the trip creation is complete.

If your department does require electronic pre-trip approval, or if a cash advance has been requested, the form must now be submitted to Workflow.

This screenshot shows a close-up of the 'Continue with Workflow' button from the previous screenshot. The button is a grey rectangular button with the text 'Continue with Workflow' in a light grey font. It is located at the bottom of the right-hand column of the 'Create a trip wizard' section. The surrounding text in the right column is partially visible, including the success message and the note about documentation requirements.

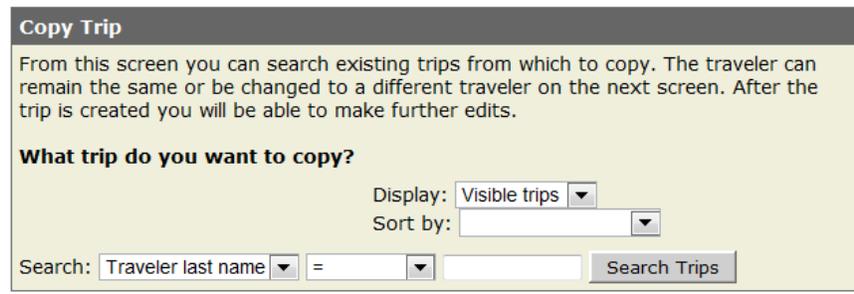
Copy Trip

Function allows user to copy an existing trip already in ProTrav. The traveler &/or trip dates may remain the same or be changed. After the trip has been created the user will be able to make further edits.

Click Copy trip on the sidebar to the left.



This will open a search screen which will allow the user to search for an existing trip to copy.



Copy Trip

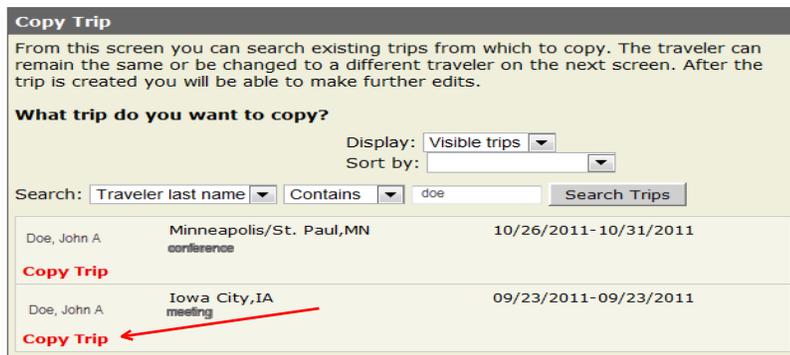
From this screen you can search existing trips from which to copy. The traveler can remain the same or be changed to a different traveler on the next screen. After the trip is created you will be able to make further edits.

What trip do you want to copy?

Display: Sort by:

Search: =

Once the user has entered the search criteria and selected search trips, the results will be displayed similar to what's shown here.



Copy Trip

From this screen you can search existing trips from which to copy. The traveler can remain the same or be changed to a different traveler on the next screen. After the trip is created you will be able to make further edits.

What trip do you want to copy?

Display: Sort by:

Search:

Doe, John A	Minneapolis/St. Paul, MN conference	10/26/2011-10/31/2011
Copy Trip		
Doe, John A	Iowa City, IA meeting	09/23/2011-09/23/2011
Copy Trip		

Select Copy Trip for the trip you wish to copy.

The next screen will look similar to below. Review the trip information. Only the traveler and/or the destination dates may be edited at this time.



Required Information

Traveler: John A Doe (JDOE)

Purpose of travel: Research

Type of travel: Individual travel

Trip description: conference

MFK: 050 - 05 - 0311 - 23000 - 00000000 - 6026 - 000 - 00000 - 60 - 0000

Destinations: Minneapolis/St. Paul, MN, USA

Depart: Return:

Select Create Trip to create the copied trip.

The next screen will be the trip summary page, similar to the below. Additional changes may be entered and the trip may be submitted to workflow if required. If this copied trip is an international trip, the user also has the opportunity to register the traveler for the Smart Traveler Enrollment Program (STEP).

Once the user clicks “Register trip with State Department, a new window or tab will open to the US Department of State’s website to enter the trip information. For more information about the STEP program, click [here](#).

If the trip requires workflow approval, select the “Submit to Workflow” button. If workflow approval is not required, this button will not display. (see screenshot on next page)

Trip: 2012 Conference

Workflow approver history:

Seq #	Received	Approver/Title	Approval	Routing	Y/N	Comments
0	Initiator	JENNIFER PORTWOOD / PROGRAM COORDINATOR	Required		Y	

Key to Y/N Column: (R) Requested Returned; (Y) Approved; (V) Voided; (N) Not Approved; (T) Tacit Approval

[Update Trip](#)
[Submit to Workflow](#)
[Cancel Trip](#)

Trip Information:

STEP: [Register trip with State Department](#)

Trip ID: 290721

Descr.: 2012 Conference

Comments:

Assigned TEVs: No TEVs assigned

Change history: [View changes](#)

Purpose: Conference/Professional Development

Departing: 10/08/2012 00:00

Returning: 10/10/2012 00:00

[Update trip dates](#)

Traveler Information:

The traveler cannot be changed once a trip is created. If this trip is for someone else, please cancel this trip and create a new trip.

Traveler: Jennifer E Portwood (PORTWOOD)

Travel type:
 Individual travel
 Group/Team travel

Campus address: VPFO-Accounts Payable & Travel 211-7 PCO

SSN: 482865081

Record history:

Created by: PORTWOOD

Last updt.: PORTWOOD on 05/11/2012 14:20

[Users with access to this trip](#)

Default MFK

MFK	Actions
050 - 05 - 0311 - 23000 - 00000000 - 6027 - 000 - 00000 - 60 - 0000	Edit

Trip destinations

Dest ID	Location	Depart - Return	Actions
349508	Wallis City, WLF	10/08/2012 - 10/10/2012	Edit Remove

Business Travel

Personal travel?	Business Start Date	Business End Date	Actions
			Edit

Destination addresses

Type	Address	Assoc Dest ID	Actions
No address(es) for this trip.			

Cash advances

Cash Adv. ID	Type	Amt. Req.	Sch. Pay Dt.	Amt. Paid	Date paid	Actions
No cash advances requested/paid.						

Passports

Country	Number	Issued	Expires	Actions
United States	*****	05/12/2011	05/12/2021	Edit Remove

Contacts

Type	Name	Method	Value	Actions
No contact(s) for this traveler.				

Attachments

[Add/Edit](#) | [Show/hide thumbs](#)

No attachments available

[Update Trip](#)
[Submit to Workflow](#)
[Cancel Trip](#)