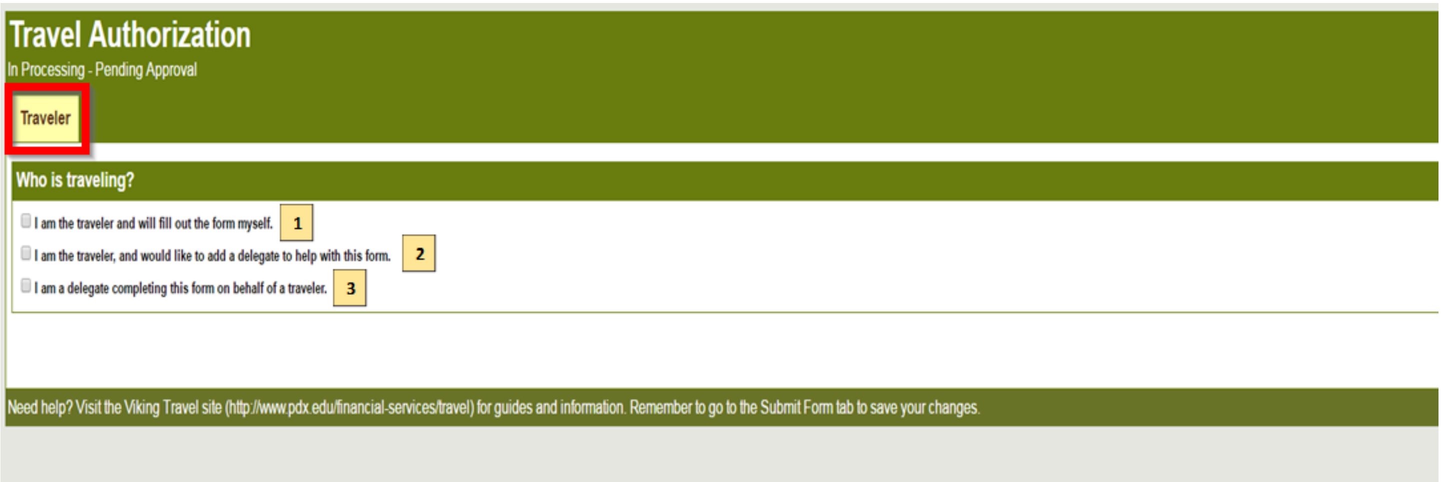
PSU's Online Travel Module - Viking Travel
Traveler & Delegate Quick Guide

Options to Proceed the Form

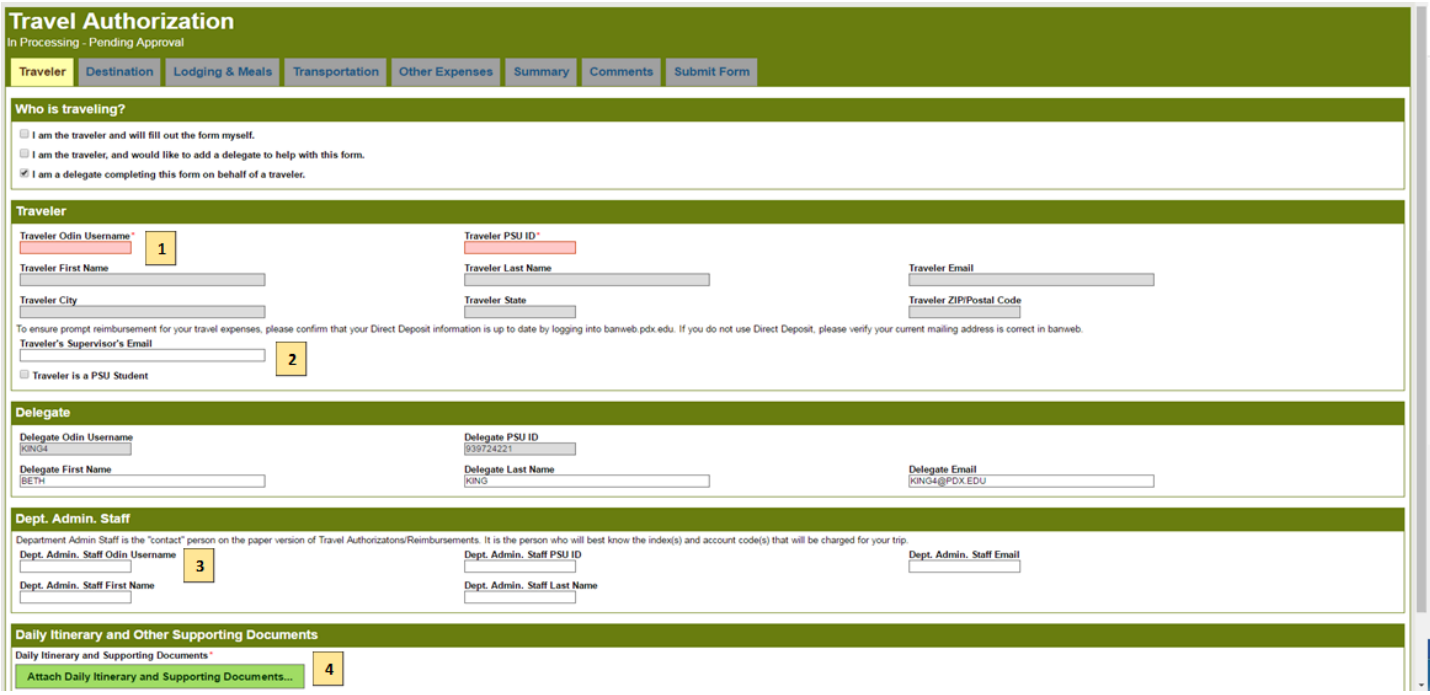


1. If Traveler wants to fill out form, just click first box
2. If Traveler wants to start form, and then have delegate help later on, just click second box
3. If Traveler wants Delegate to completely fill out form, just click third box

DO NOT CLICK ENTER ON KEYBOARD. THIS WILL TAKE YOU OUT OF THE FORM.

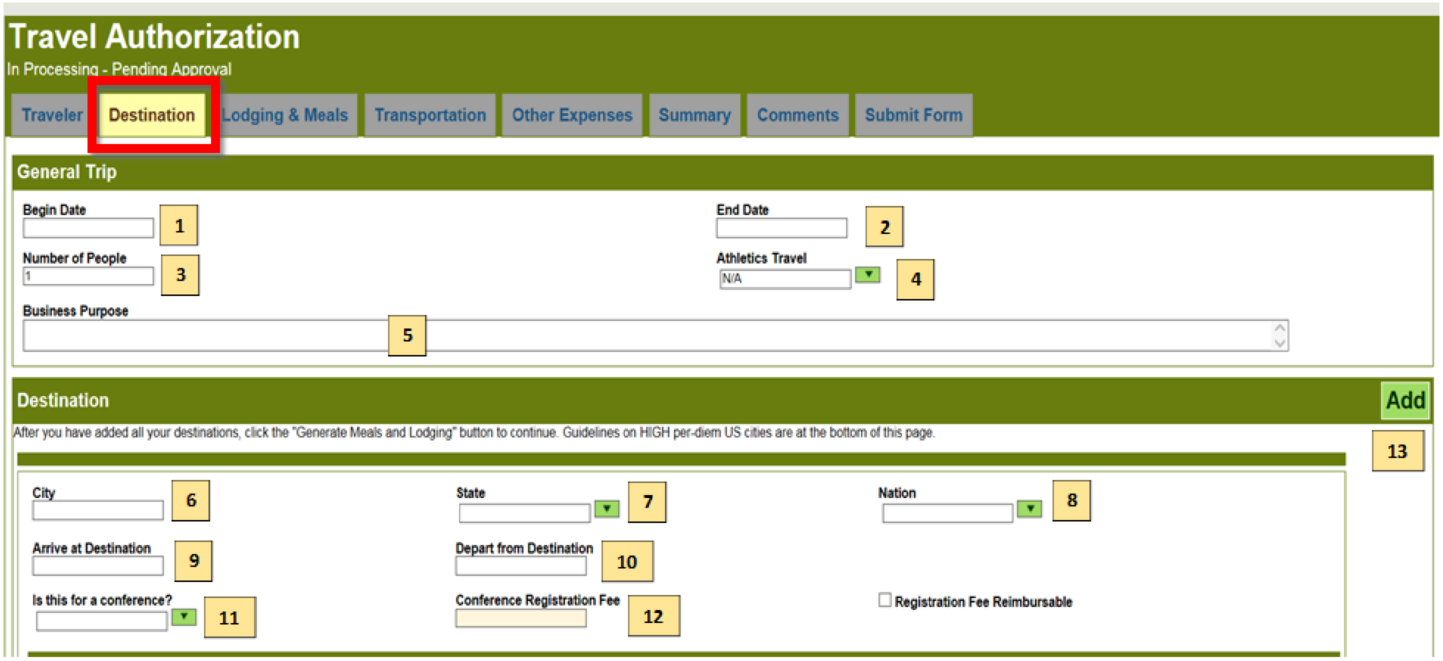
There is a 3rd role in Viking Travel called the Dept. Admin Staff or DAS for short. **You MUST fill in this section.** This role will enter the index to be charged in the Banner Finance system and also the account codes charged. The DAS will also enter the Department Approver. The DAS ODIN Username must be entered here. The Delegate would need to re-enter their ODIN Username if they also take on that role.

Traveler Tab



1. If Traveler, your information will auto populate and you do not enter info in the Delegate box. If Delegate, you must enter in Traveler's ODIN. Rest will auto populate.
2. Supervisor of Traveler will receive email notification of travel if approved. For info only
3. **Department Admin Staff (DAS) Odin Username must be filled in**
4. **REQUIRED**: Upload Itinerary or Conference Agenda.

Destination Tab



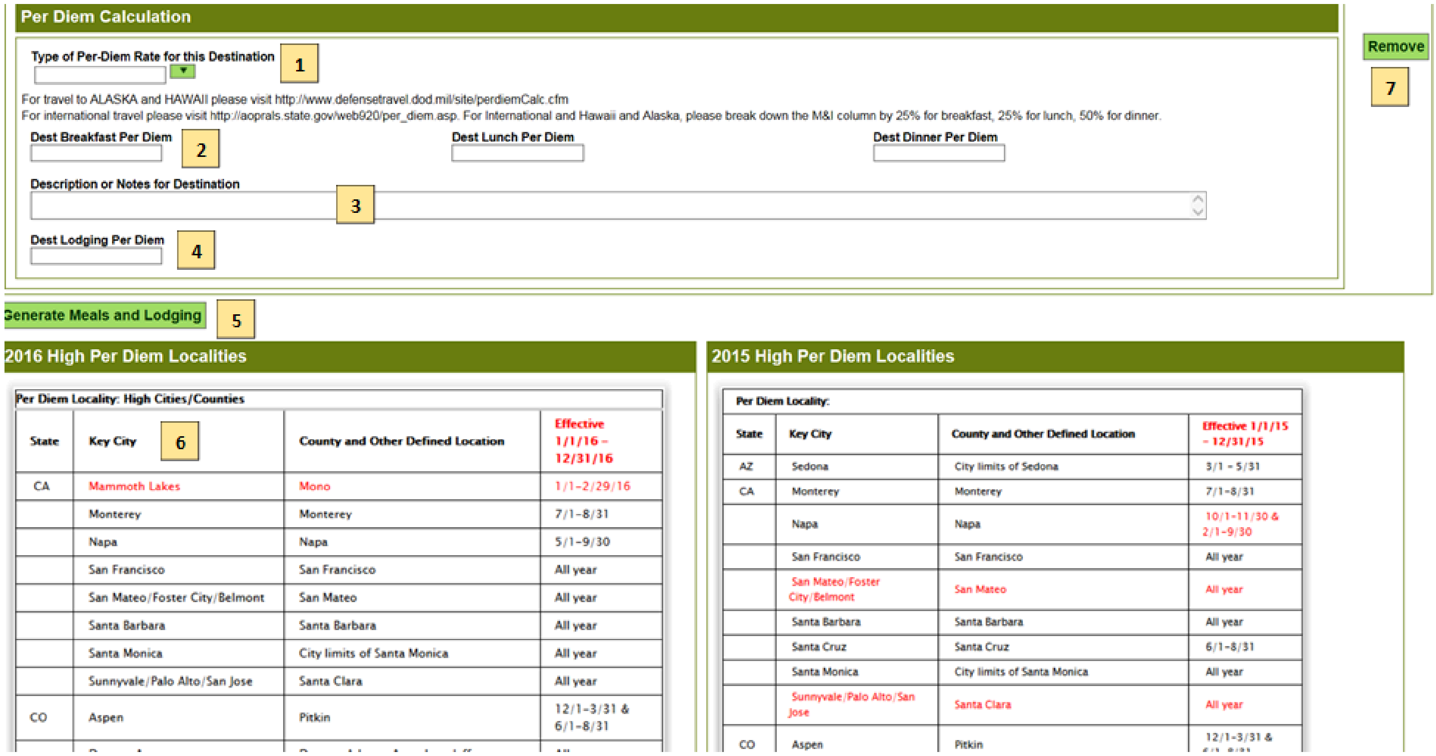
The Destination Tab drives the Meals and Lodging Per diem. If you are only claiming mileage/transportation, you may go straight to the Transportation Tab.

1. Date Traveler leaves Portland
2. Date Traveler arrives at Destination
3. Number of People (Defaults to 1)

   Athletics, Faculty-Led Groups will often be paying for multiple athletes/students
4. If Athletics Travel, use "Athletics Travel" dropdown
5. Must put detailed Business Purpose (Required field)
6. Enter City of Destination
7. Enter State
8. Enter Nation if International. Not required if Domestic
9. Enter Date of Arrival at Destination City
10. Enter Date of Departure from Destination City

    The purpose in entering date of Arrival and Departure is to capture lodging per diem
11. Click Yes or No depending on if a conference is purpose of trip
12. Enter Amount of Conference Reg Fee. Check the checkbox if traveler needs reimbursement (i.e., not paid by PCard)
13. If multiple destinations, you can click Add and more destination boxes appear.

Destination Tab (continued)



Per Diem Locality: High Cities/Counties

State	Key City	County and Other Defined Location	Effective 1/1/16 – 12/31/16
CA	Mammoth Lakes	Mono	1/1-2/29/16
	Monterey	Monterey	7/1-8/31
	Napa	Napa	5/1-9/30
	San Francisco	San Francisco	All year
	San Mateo/Foster City/Belmont	San Mateo	All year
	Santa Barbara	Santa Barbara	All year
	Santa Monica	City limits of Santa Monica	All year
	Sunnyvale/Palo Alto/San Jose	Santa Clara	All year
CO	Aspen	Pitkin	12/1-3/31 & 6/1-8/31

Per Diem Locality:

State	Key City	County and Other Defined Location	Effective 1/1/15 – 12/31/15
AZ	Sedona	City limits of Sedona	3/1 - 5/31
CA	Monterey	Monterey	7/1-8/31
	Napa	Napa	10/1-11/30 & 2/1-9/30
	San Francisco	San Francisco	All year
	San Mateo/Foster City/Belmont	San Mateo	All year
	Santa Barbara	Santa Barbara	All year
	Santa Cruz	Santa Cruz	6/1-8/31
	Santa Monica	City limits of Santa Monica	All year
	Sunnyvale/Palo Alto/San Jose	Santa Clara	All year
CO	Aspen	Pitkin	12/1-3/31 &

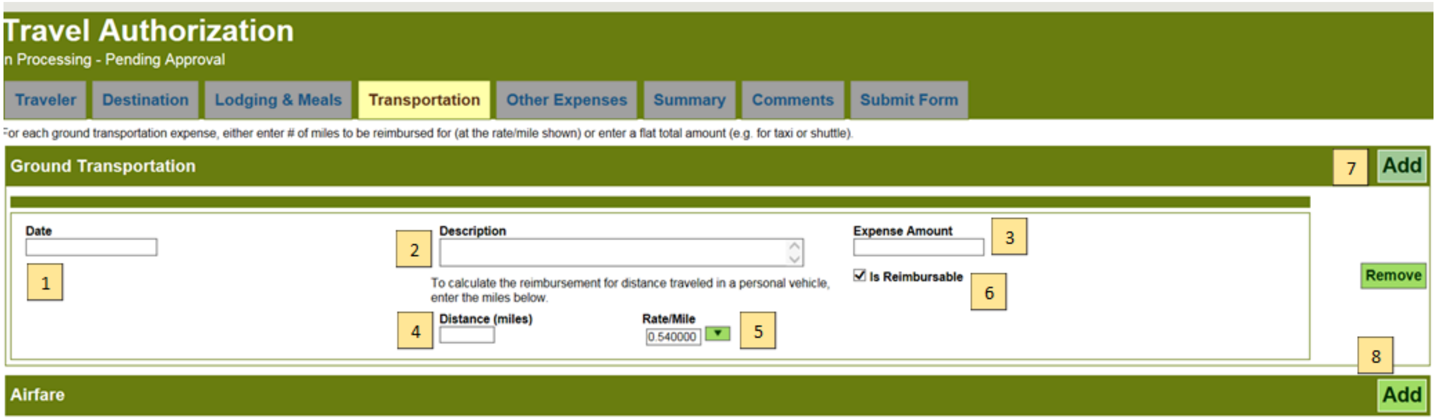
1. Use dropdown arrow to choose the type of per diem High City/Conference, Low City, Athletics… *Conferences always at high rates*
2. Per Diems for Meals will automatically populate based on dropdown choice
3. Description or Notes for Destination is not required but helpful and especially if any personal travel
4. Per Diem for lodging will automatically populate based on dropdown choice
5. MUST Click Generate Meals and Lodging to auto populate to next Tab
6. High/Low City Table is helpful. If the city is not listed, IT IS A LOW CITY PER DIEM
7. If a mistake is made and you need to delete destinations, click Remove.

- You MUST click Generate Meals and Lodging button, this will auto populate the next Tab, Lodging and Meals
- Two Years are presented for Travelers to wrap up travel that may have taken place at end of previous calendar year

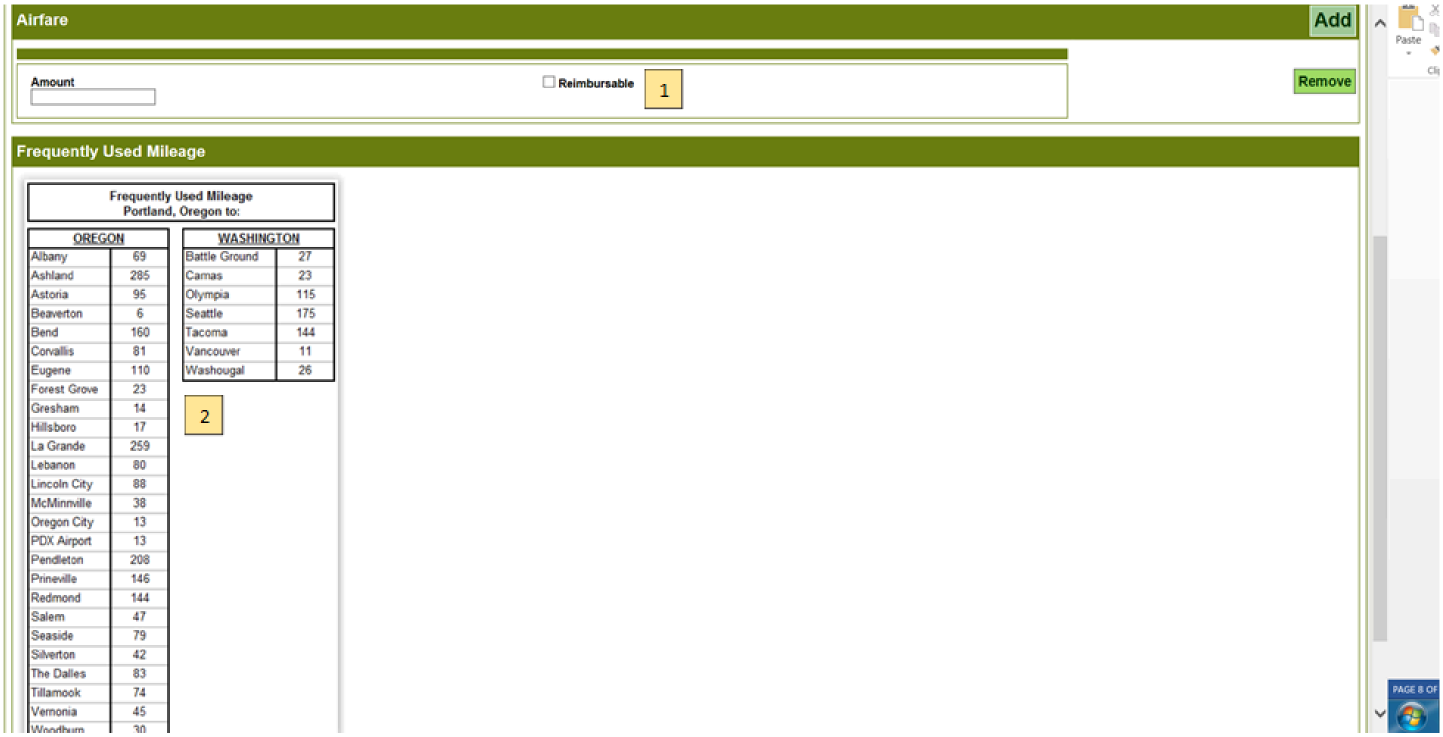
Lodging & Meals

1. Lodging Name is optional but at times helpful.
2. City is required
3. Room Rates will auto populate from the Destination Tab.   These can be overridden.
4. Business Check-In Date
5. Business Check-Out Date
6. # of Business Nights auto populates from Business Check-in and Check-Out
7. # of Rooms defaults to 1 but useful for ATH and Faculty led programs with multiple rooms
8. Be sure and check box if lodging is Reimbursable (needed if some hotels invoice instead)
9. Date of Meals will auto populate from Destination Tab
10. Breakfast, Lunch, and Dinner will auto populate from Destination Tab
11. Reimbursable Boxes auto populate checked but can be **unchecked** if not to be reimbursed, for example if Conference paid for a meal. Also these per diem amounts can be **manually** overridden to actual amounts.
12. Add and Remove buttons allow for more additions or delete if mistakes are made. Use Remove if need to delete the entire day of meals.

Transportation Tab



1. Enter Date of Ground Transportation. If you are entering round trip distance, you only have to enter one of the dates of the trip
2. Enter Description of Ground Transportation such as Taxi, Shuttle, Train, Mileage, Rental Car
3. Enter Expense Amount. If mileage, this will auto populate once distance is entered
4. Distance. This can be entered as a round trip.
5. Rate/Mile. This will always be read only and updated per IRS law based on Calendar Year.
6. If Ground Transportation is not to be reimbursed, for example, rental car, then click here. Otherwise, leave box checked
7. If multiple days are being requested for reimbursement (such as monthly or by term for mileage), you can just put the total amount of expenses or total distance in miles on this form and upload a spreadsheet of daily amounts and miles.
8. In order for the Airfare box to appear, Click Add to the right. The Amount and Reimbursable box will then appear.



Frequently Used Mileage
Portland, Oregon to:

OREGON	
Albany	69
Ashland	285
Astoria	95
Beaverton	6
Bend	160
Corvallis	81
Eugene	110
Forest Grove	23
Gresham	14
Hillsboro	17
La Grande	259
Lebanon	80
Lincoln City	88
McMinnville	38
Oregon City	13
PDX Airport	13
Pendleton	208
Prineville	146
Redmond	144
Salem	47
Seaside	79
Silverton	42
The Dalles	83
Tillamook	74
Vernonia	45
Woodburn	30

WASHINGTON	
Battle Ground	27
Camas	23
Olympia	115
Seattle	175
Tacoma	144
Vancouver	11
Washougal	26

1. Defaults to unchecked as most travelers use contracted travel agencies.
2. We have uploaded a Frequently Used Mileage Chart for your convenience. If your destination is on this chart, no need to upload more documentation. Also, you can enter the link to map quest that shows your destination city in the Description box. The Approvers can then copy and paste this link to verify your distance mileage.

If the city is not listed here, map quest is needed UNLESS the mileage is 74 miles one-way, or 148 miles round trip.

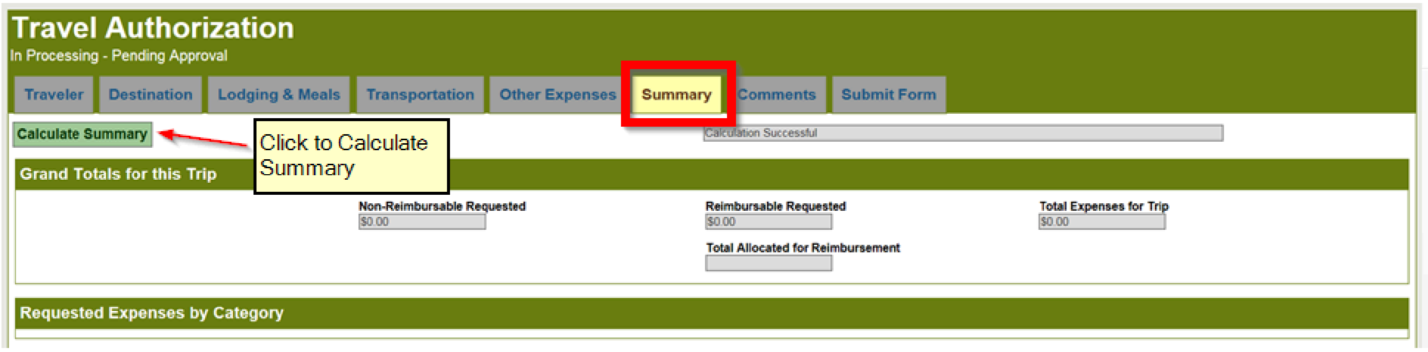
Other Expenses Tab

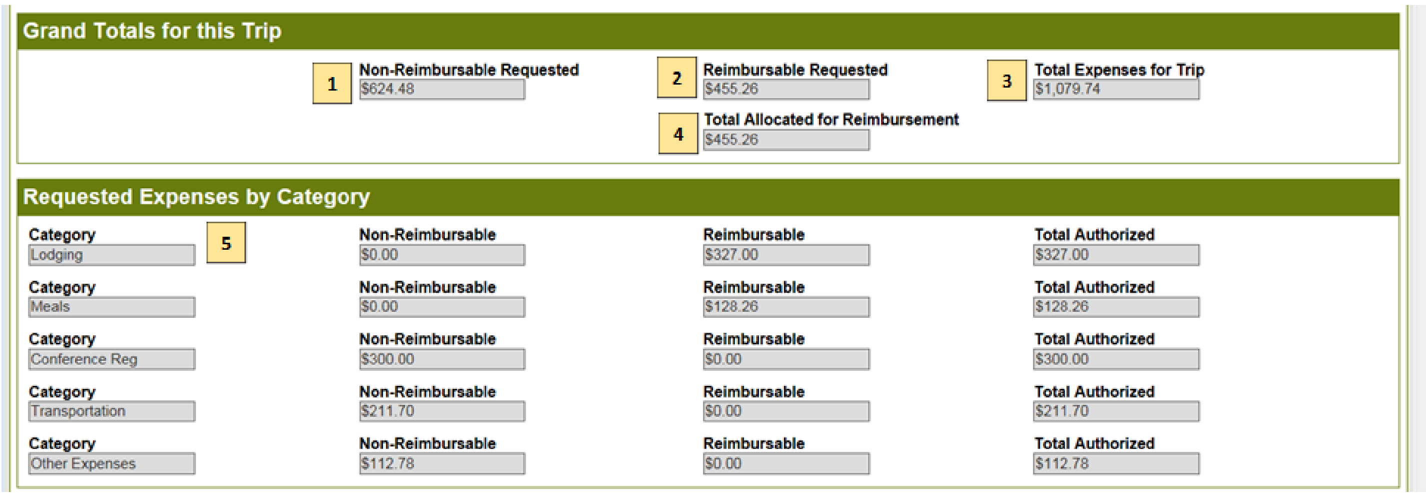
1. Click Add button
2. Enter Description
3. Enter Expense Amount
4. Click Reimbursable button

Examples of Other Expenses:

- Printing
- Internet
- Baggage (This expense can also go in Transportation Tab)
- Entry fees
- Translation fees
- Visa/Passport

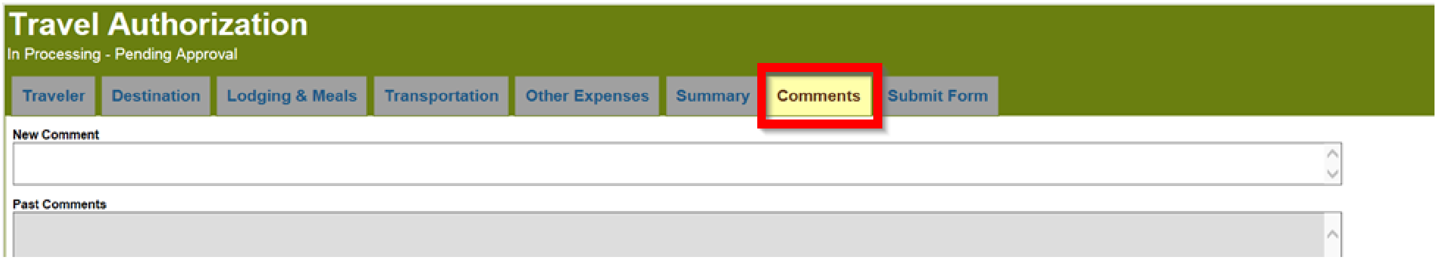
Summary Tab





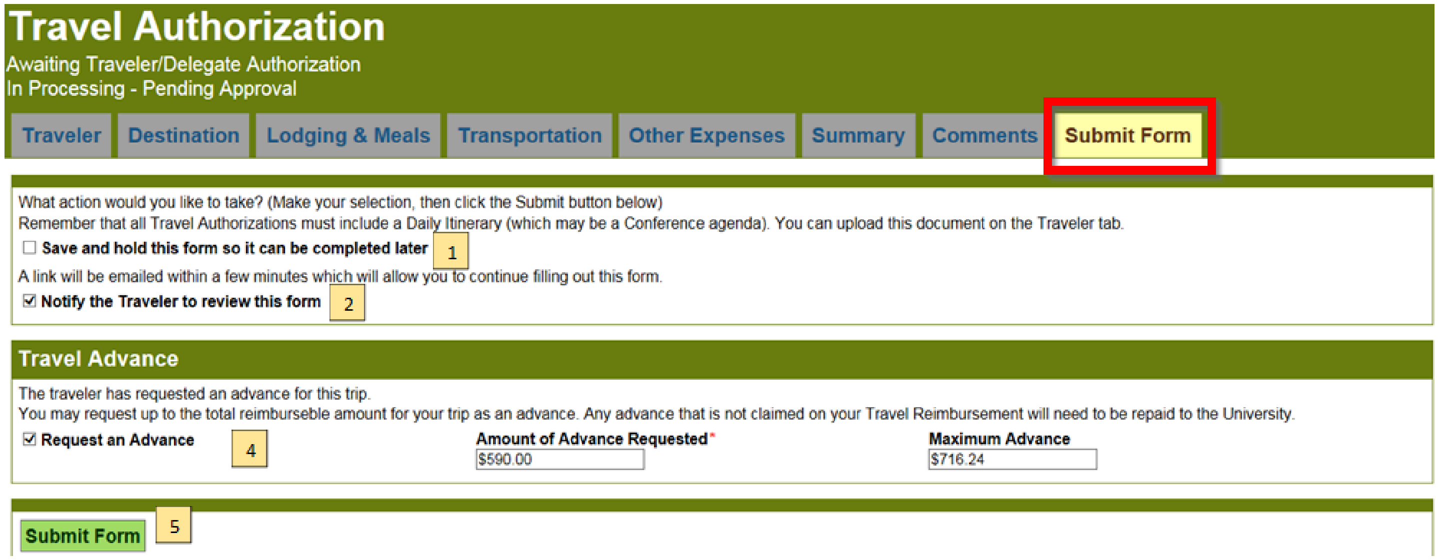
1. Non-Reimbursable Amount (needed to capture full trip costs, although direct billed)
2. Reimbursable Requested
3. Total Expenses for Trip= Non-Reimbursable + Reimbursable
4. Total Allocated for Reimbursement (sometimes Dept. or Grants only allow certain dollar amount, regardless of actual costs)
5. Expenses are itemized by categories for better review, Non-Reimbursable, Reimbursable, and Total Authorized. Only the Reimbursable amounts will flow over to the Funds Tab.

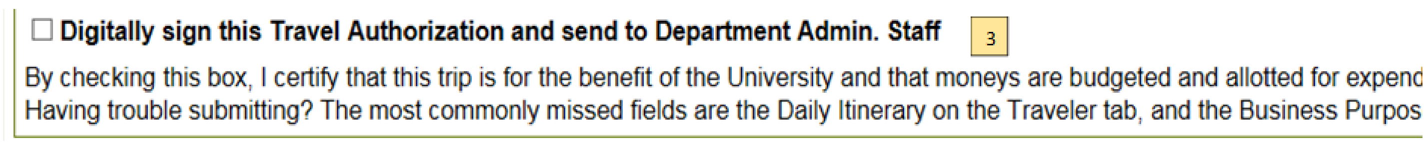
Comments Tab



All Comments in “Past Comments” are for Read Only. Comments are welcomed in the Module and required if a document is sent back. Comments must be typed in the “New Comment” box.

Submit Form Tab





1. Traveler/Delegate can Save and hold form to complete later
2. If Delegate, Box is to be checked to notify Traveler to review and approve the form. Once the Submit Form is clicked, workflow will then route to Traveler to review and approve.
3. If Traveler filled out form with no Delegate, box is to be checked that reads above “Digitally sign this Travel Authorization and send to Department Admin Staff”
4. Traveler/Delegate can request an Advance by checking the Request an Advance box
5. Whether Traveler or Delegate, the Submit Form button MUST BE CLICKED to activate workflow.

You are almost done…Once the Traveler/Delegate has clicked the Submit Form button, the workflow will route to the Department Admin Staff (DAS) to enter the accounting information (index and account codes). An email notification will be sent to the DAS indicating the document needs funding information. If you put yourself down as DAS on the Traveler Tab, then you would receive the email and then continue into the form by clicking on the email link. *Most travelers do not choose to enter the accounting information.*

Once the Traveler/Delegate sends the workflow to the DAS, your work is done unless the document needs to be corrected or modified in some way. If this is the case, you will receive an email notification indicating that the document has been returned by DAS and needs modification. In the email it will state that you need to view Comments Tab to determine what the DAS or Approver needs. You would view *Past Comments* in the Comment Tab. The Delegate will also be copied with the Traveler in case the Traveler chooses for the Delegate to modify the Authorization. Of course, depending on the situation, this email back and forth could continue but once the DAS and Approver are satisfied and the Approver finally approves, you will receive an email indicating the Travel Authorization has been approved with the amount. Then you simply wait to go on the trip and you will receive an email with a link in the email to the Travel Reimbursement to start entering actual dollars spent even while you are on your trip! Once the trip is over and you have completed the **Travel Reimbursement** form online, it will once again route to the DAS and Approver. The same workflow is with the Travel Reimbursement as was with the Travel Authorization. The same email notification is with the Travel Reimbursement as was with the Travel Authorization. The only difference is that the Travel Reimbursement has an added tab, **FILES** tab for uploading multiple documents or receipts.

This concludes the Traveler & Delegate training. If, as Traveler or Delegate, you are also the DAS, please see the DAS Quick Guide.