Before USF business travel occurs, a Travel Request must be submitted and fully approved in Archivum. The Travel Request acts as the traveler’s permission to travel and provides an estimate of what a specific trip will cost. This guide will explain the process of submitting a Travel Request (click the arrow to the left of each step to expand each section). For a full overview of the Travel Request workflow, please refer to the *Travel Workflow Process Map* available on the USF Travel Training webpage.

# **Step I: Creating a Travel Request**

To create a Travel Request:

1. Log in to [**my.usf.edu**](https://my.usf.edu/)**.**
2. Click **Archivum** in the Business Systems menu.

A screenshot of a computer

Description automatically generated

1. Click **Create Travel Request** in the My Actions section.

A screenshot of a computer

Description automatically generated

1. Select the type of Travel Request.
2. Select **Travel Request** if the travel dates will occur after the date of the request. The request must be fully submitted and approved before the travel start date.
3. A **Post-Travel Authorization** (PTA) is only appropriate in emergency situations when a Travel Request is not fully submitted prior to the travel start date. A PTA will require a justification and VP signature. If selecting **Post-Travel Authorization**, refer to the Post-Travel Authorization Submission Training Guide available on the USF Travel website.

A screenshot of a travel request

Description automatically generated

1. Once the TR type is selected, click Next. Archivum will prompt you to select a profile. If you are submitting a Travel Request for yourself, click **Myself.** If you are submitting a Travel Request on behalf of someone else, click **My Travelers**, then select the traveler you are submitting the Travel Request for. If a traveler has more than one traveler profile, ensure the correct profile is being selected; Archivum will display department and HR supervisor information for each profile.

Myself:

A screenshot of a computer

Description automatically generated

My Travelers:

A screenshot of a computer

Description automatically generated

1. Once a profile is selected, click Next.

# **Step II: Entering Travel Details**

1. On the Preliminary Information page, fill out the Travel Details section, which describes the travel:
   1. Include a description of the upcoming travel
   2. For business purpose, select the appropriate category from the drop-down menu
   3. In the comment box, enter a brief overview of the trip and the reasons for traveling

A screenshot of a computer

Description automatically generated

1. If a separate delegate will be completing the expense information for this request, click **Show all Delegates**, then choose a delegate from the drop-down menu. If you are entering the expense information for this request yourself, leave this box blank.

A screenshot of a computer

Description automatically generated

1. Enter the trip itinerary in the **Destinations** section, including:
   1. Start Date – Date of arrival at the destination
   2. End Date – Date of departure from the destination
   3. The destination of the trip

A screenshot of a computer

Description automatically generated

1. If there are multiple destinations, click **Add Location** and fill out the same information (Start Date, End Date, & Destination). You will need to specify which destination is furthest in distance from Tampa by checking the box on the right.

A yellow arrow pointing to a black arrow

Description automatically generated

A white background with blue text

Description automatically generated

1. **Save Draft** can be selected if you wish to save your progress and return to this request later. Otherwise, if you are entering expense details, such as chartfields and anticipated expenses, click **Enter Expense Details**. If you are **not** entering expense details, click **Submit to Supervisor**. Note that all foreign Travel Requests are subject to review by Research Integrity & Compliance (RIC) before Supervisor review. If “Submit to Supervisor” is selected for a foreign Travel Request, additional steps are required before the TR reaches the traveler’s Supervisor. More information on these steps is available later in this guide, see “Step VII: Foreign Travel Requests.”

A green rectangular sign with white text

Description automatically generated

# **Step III: Adding a Chartfield**

On the **Accounting Defaults** page, you will see a display of the travel details you previously entered. If a default chartfield is already on the traveler’s profile in FAST, you will see it populated under the **Chartfields** section. If there is not a chartfield:

1. Click Add Chartfield.

A screenshot of a website

Description automatically generated

1. Enter the appropriate codes for each field. Add a descriptive nickname that will help you easily identify the chartfield later.

A screenshot of a computer

Description automatically generated

1. If more than one chartfield is needed, click Add Chartfield again and repeat the process above. In this case, you will need to specify the percentage for each chartfield; they should all total 100%.

A screenshot of a quiz

Description automatically generated

1. Once you have completed the Chartfields section, click Next.

# **Step IV: Entering Anticipated Expenses**

On the **Anticipated Expenses** page, you can list all anticipated Travel Expenses that are known, or can be projected, for the trip.

1. In the top section of the page, select all expense types that apply for this trip.

A screenshot of a survey

Description automatically generated

For each expense type that you select, a corresponding form will appear below in the **Anticipated Expense Estimates** section.

A screenshot of a computer

Description automatically generated

1. In the **Anticipated Expense Estimates** section, enter the estimated amount, payment type, and chartfield percentage for each expense type.

A screenshot of a computer

Description automatically generated

If only one chartfield was entered on the Travel Request, the percentage will be 100% by default. If more than one chartfield was entered on the Travel Request, the sum of chartfield distribution must equal 100%.

A screenshot of a computer

Description automatically generated

The estimated amount of an expense cannot equal 0.

A screenshot of a computer screen

Description automatically generated

1. Once all anticipated expenses have been added to the Travel Request, click Submit.

# **Step V: Monitoring Travel Request Status**

Following submission of a Travel Request, a Travel Request ID Number will be generated and the Travel Request will be sent to the traveler’s HR supervisor. From this point, it is **the responsibility of the submitter** to monitor the status of Travel transactions they have created, and to follow-up with supervisors/fiscal approvers when necessary to ensure the timely completion of these transactions. The status of a Travel Request can be monitored in Archivum.

Travel reports in Power BI, including the “Travel - Pending Status Travel Requests” report, can also be used to monitor details of Travel Requests submitted in Archivum, such as current status of the TR and days since last action by a user. For more information on navigating Travel reports in Power BI, please refer to the “Quick Start Guide to Archivum Travel Reports”, and the “User Guide to Archivum Travel Reports”, both available on the Travel Training page of the Travel website.

To monitor the status of a Travel Request in Archivum:

1. Open **Archivum**, then click **Travel Records**.

A green airplane with black text

Description automatically generated

1. On the top of the page, click the **Travel Requests** icon.

A screenshot of a computer

Description automatically generated

1. Click **My Trips** if you are viewing a Travel Request you have submitted for yourself. Click **My Travelers’ Trips** if you are viewing a Travel Request you submitted on behalf of someone else. Then, use the search feature to find the Travel Request.

A screenshot of a computer

Description automatically generated

1. Once you find the Travel Request you want to view, click the magnifying glass under More Info and scroll down to see TR details, any pending tasks and its assignee(s), and the history of the request.

A screenshot of a computer

Description automatically generated

To **log out** of Archivum:

1. Click the profile icon on the top right hand of the screen.

A yellow arrow pointing to a person's head

Description automatically generated

1. Click **Sign Out**.

# **Step VI: Travel Request converted to a Post-Travel Authorization**

When a Travel Request has not been fully approved prior to the travel start date, the Travel Request will be returned to the submitter and converted to a **Post-Travel Authorization**. Additional steps that are required as part of the PTA process are outlined below:

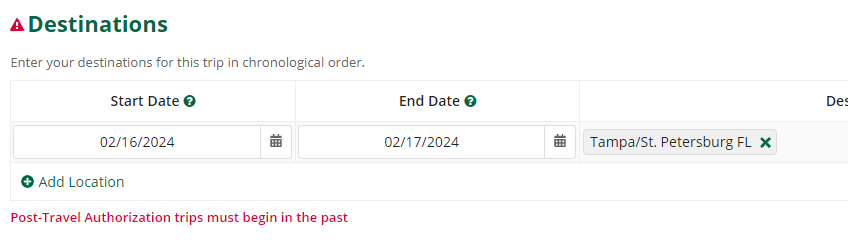
1. On the Preliminary Information page, under Post-Travel Authorization Details, provide the following:
   1. Reason for PTA – A detailed explanation of why the Travel Request was not submitted and approved before the travel dates, including why it was out of the traveler’s control.
   2. Preventive Action – How this situation will be avoided in the future.

A close up of a computer screen

Description automatically generated

Archivum will not allow you to complete the request if either of these boxes are left blank.

1. If you need to edit the Start Date for a PTA TR, Archivum will not allow you to input today’s date, or a date in the future; the trip must begin on a past date.



1. From here, the process of submitting a PTA TR is the same as the submission process for a Travel Request. Following submission, the PTA TR will be sent to the traveler’s HR supervisor. The status of a PTA TR can be monitored by following the instructions in Step V of this document, “Monitoring Travel Request Status.” As mentioned previously, it is the responsibility of the submitter to monitor the status of travel transactions, including PTA TRs, they have created.
2. Once a PTA TR receives fiscal approval, the following task will be assigned to the TR submitter: “VP Signature for Travel Request…”

A close up of numbers

Description automatically generated

1. Within the task, under **Documents**, download the unsigned Post-Travel Authorization approval document.

A yellow line with green and blue text

Description automatically generated

1. The downloaded document is a pre-filled PDF that will display traveler and travel details, as well as the stated reason for the PTA and preventive action. The form must be signed by the appropriate VP.

A close-up of a travel authorization form

Description automatically generated

1. Once the approval document has been signed, return to the VP Signature task. Under **Upload Approval Document**, click the Upload button, then select the signed Post-Travel Authorization document. The document must be uploaded in a **PDF format.**

A screenshot of a computer

Description automatically generated

A screenshot of a computer

Description automatically generated

1. Once the document is uploaded, click **Submit.** The Post-Travel Authorization Travel Request is not fully approved until the approval document has been uploaded and submitted.

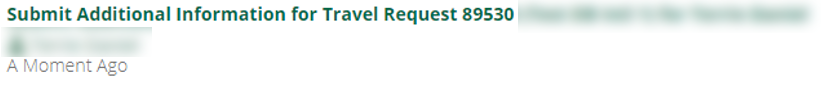
# **Step VII: Foreign Travel Requests**

Per Florida Statute section 1010.36, any employment-related foreign travel and employment-related foreign activities engaged in by all faculty, researchers, and research department staff must be screened and pre-approved by Research Integrity & Compliance (RIC). All Travel Requests to foreign locations require RIC approval before Supervisor review and approval.

After submission of a foreign Travel Request, the TR will be directed to the traveler to answer questions, and review and acknowledge USF Policies and Directives. In cases where the traveler is not an employee, the task will be sent to the submitter; the submitter must upload the signed attestation from the traveler.

These additional steps to the Travel Request process are below:

1. After submission of a foreign Travel Request for a USF employee, the traveler will be assigned a “Submit Additional Information” task.



1. Within the task, the traveler will be asked to answer, review, and acknowledge the following:

A screenshot of a computer

Description automatically generated

1. Once the required fields have been completed, the traveler can click **Submit** in the bottom right.

A green rectangle with white text

Description automatically generated

1. After submission, the Travel Request will be directed to Research Integrity & Compliance for review & approval. Following RIC approval, the Travel Request will move forward to the traveler’s Supervisor.

If the traveler is not an employee:

1. After submission, the “Submit Additional Information” task for the Travel Request will be assigned to the TR submitter.
2. Within the task, the submitter will answer and review the following:

A screenshot of a computer

Description automatically generated

1. The traveler is required to sign this attestation document. The submitter must upload the signed document (and any other supporting documents) using the Upload button.

A document with a green and white text

Description automatically generated with medium confidence

A close-up of a sign

Description automatically generated

1. Once the signed attestation has been uploaded and all required fields are complete, the submitter can click **Submit** in the bottom right. The Travel Request will be directed to RIC for final approval.

If a foreign Travel Request is returned by a Supervisor, Fiscal Approver, or due to budget check failure after RIC approval, it will not require further RIC review unless changes are made to the travel request's dates and/or locations.

Adding Contact Information:

1. For foreign Travel Requests, contact information must be provided. Locate the Travel Request, then click the yellow icon in the **Contact Info** column.

A yellow arrow pointing to a white box

Description automatically generated

1. A form will expand below that will allow input of emergency contact information. Required fields are marked by an asterisk (\*). Once the form is complete, click Save.

A screenshot of a computer

Description automatically generated

1. Once contact information has been provided, the **Contact Info** icon will turn green.

A screenshot of a phone

Description automatically generated