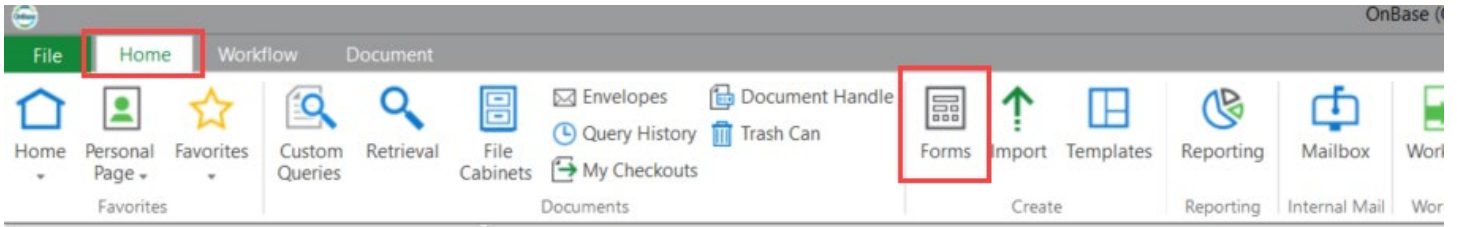


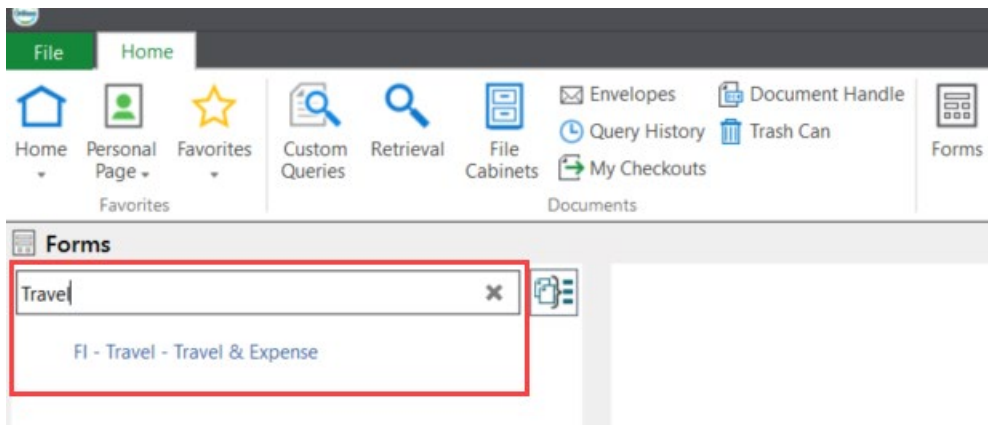
OnBase Travel Quick Start Guide

1. Log in to OnBase Travel & Expense form

- a. Login to OnBase
- b. Go to Home and click on Forms



- c. Search "travel" in the search bar and click on form "FI – Travel – Travel & Expense"



- d. A new form will appear for you to fill out. Note the "Travel Request Number" that will be at the top of the form. Please include the number when reaching out about the travel to Business Operations.

A screenshot of the 'Request Information' form. The form has a title 'Request Information' in a grey box. Below the title, there is a field labeled 'Travel Request Number' with the value '9' entered. The form is partially visible, showing the top section.

2. Traveler:

- a. Select if travel is being requested for yourself or another traveler. Note that
 - i. If someone else, indicate if they have an employee ID and enter what it is
 - ii. If for yourself, your employee ID will automatically fill in
- b. Fill in the empty fields that did not automatically populate after Employee ID field was filled out.
 - i. If fields other than Speedtype need information, after filling in those fields, select "Yes" to Travel Profile Needed. Otherwise, select "No" to Travel Profile Needed
 - ii. Enter any comments about traveler profile, including if any information is incorrect and needs changed. If travel profile is needed, please add Supervisor's employee ID and default speedtype
 - iii. Select if the travel is Pre- or Post-Travel from the drop down

Traveler

[See A General Policy pg 1](#) [B. Administration of Policy pg 2](#) [Definitions - Workstation pg 4](#)

Are you entering travel for yourself?*

YES

NO

Does the traveler have an employee ID?

YES

NO

Employee ID

First Name

Last Name

Department Name

Department Number

Email Address

Supervisor First Name

Supervisor Last Name

Speedtype

Comments

Travel Profile Needed*

YES

NO

Pre-Travel or Post-Travel*

2a (i) points to 'Are you entering travel for yourself?' and 'Does the traveler have an employee ID?'

2a (ii) points to 'Employee ID' and 'Comments'

2b (i) points to 'Comments'

2b (ii) points to 'Email Address' and 'Comments'

2b (iii) points to 'Pre-Travel or Post-Travel'

3. Dates & Status:

- Select Travel Beginning Date from drop down calendar. Repeat for Travel End Date
- If any personal travel during trip, please select "Yes" and fields will appear to enter non-reimbursable amount and personal travel dates
- Select the Traveler's Status and their Travel Type. Note that if a student is also paid/employed by the University, their employee status is used for the profile. However, you can still select student travel as the Travel Type

Dates & Status

Travel Beginning Date*

Travel End Date*

Any Personal Travel Dates?

YES

NO

Amt Non-Reimbursed

Personal Travel Begin Date

Personal Travel End Date

Traveler Status

EMPLOYEE

STUDENT

COMMUNITY LEADER

OTHER

Traveler Type

STUDENT TRAVEL

EMPLOYEE TRAVEL

OTHER

3a points to 'Travel Beginning Date' and 'Travel End Date'

3b points to 'Any Personal Travel Dates?' and 'Amt Non-Reimbursed'

3c points to 'Traveler Status' and 'Traveler Type'

4. Destination & Purpose:

- Fill out the Destination and Trip Description fields. Note that there is a max character limit of 250. If longer, type up in a word document and attach to form

- b. Select Destination type (Domestic or International) and Duration of the trip (One day or Overnight)
- c. Select Business Purpose and enter information based on what is selected.
- d. Attach documentation. For international travel, you must attach the necessary files to be able to submit travel form
- e. Add any comments

Destination & Purpose

Destination
City, State

Trip Description

Destination Type(s)
 DOMESTIC
 INTERNATIONAL

Duration of Trip
 ONE DAY
 OVERNIGHT
[See F. Meals and Other Expenses pg. 8 #1](#)

Business Purpose
 CONFERENCE MEETING RECRUITING RESEARCH OTHER

Registration Fee PREPAID REIMBURSED

Please attach conference agenda and other trip documentation (0)
 Conference agenda and other trip documentation

Please attach receipts and trip information (0)
 Receipts and Trip Information

Please attach your out of country authorization and/or final Provost approval email (0)
 Out of Country Authorization and/or Provost Approval Email

Comments

5. Funding:

- a. Indicate if an outside third party (non-sponsored program) is covering any travel related expenses. If the travel will be charged to a Federally Sponsored Program, additional documentation and information will be required. Indicate if there is a max travel allowance and/or a cash advance

6. Transportation:

- a. Select the method of transportation(s) used for the trip and if it is prepaid or reimbursed. Enter the amount, speedtype and select the Method of Payment from drop down menu
- b. Selecting either Rental Car or Private Car require you to fill in the Destination Depart & Arrival Date & Times

Transportation

Rental Car Private Car
[See policy T&L pg transportation-lodging #2](#)

PREPAID REIMBURSED

Amount

Speedtype

Method of Payment

To Destination Depart Date & Time

From Destination Depart Date & Time

To Destination Arrival Date & Time

From Destination Arrival Date & Time

- c. Private car also requires total mileage, selecting either Standard or Reduced (mileage rates), and attaching file/s with the mileage detail (mileage date, start and end destinations, and mileage for each)

Private Car
See policy T&L pg. transportation-lodging #2

Mileage Type STANDARD REDUCED Speedtype

To Destination Depart Date & Time To Destination Arrival Date & Time

From Destination Depart Date & Time From Destination Arrival Date & Time

6c

Mileage Tracker

Date	From Location	To Location	Total Trip Miles	Business Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please attach area map for mileage (0)

Area Map for Mileage

7. Lodging:

- a. Provide name of hotel and hit tab for the section populate with more information that is needed. Indicate if it is prepaid or reimbursed, the amount, and speedtype to allocate to. If conference was checked for Business Purpose, then questions will be asked about the hotel being the preferred conference hotel

8. Miscellaneous Charges:

- a. Indicate any Meals (Per Diem) that need reimbursed. Enter total amount and speedtype. For post-travel, the subsection Travel – Per Diem appears and works in lieu of the per diem sheet. You can add a line for each day

Miscellaneous Charges

*Business Operations recommends an estimation of \$75 per day for meals.

Meals Amount Speedtype

See F. Meals and Other (M&O) Expenses pg. 8

TRAVEL – Per Diem

Indicate meals that per diems **should** be paid for with a Check Mark next to the meal

Conference provided meals cannot be claimed unless approved by the Department.

Date of Travel	<input type="checkbox"/> Breakfast	<input type="checkbox"/> Lunch	<input type="checkbox"/> Dinner	Notes
<input type="text"/>				<input type="text"/>

See flight arrival and depart times for per-diems below:

Depart Prior To:	6:30am	11:00am	5:00pm
Return After:	9:00am	2:00pm	7:00pm

- b. Indicate any Ground transportation by entering total amount and speedtype. If multiple trips, you can add each to the Travel – Ground Transportation subsection and click Add for more lines

Miscellaneous Charges

Meals
See F. Meals and Other (M&O) Expenses pg. 8

Ground Transportation Amount Speedtype

See E. Transportation and Lodging pg. 6 #4
Uber rides are not covered to and from dinners. That is considered part of the per diem. The only time Ubers are covered is to and from the airport and to and from the conference (If traveler is not staying in conference hotel).

TRAVEL – Ground Transportation

Date	From Location	To Location	Business Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- c. Indicate if any baggage, parking, tips, tolls, international travel insurance and/or other expenses

9. Summary & Submit:

- a. Review the information to ensure it is accurate
- b. Scroll down to bottom of form and click on Submit

Document Retrieval

Step 1: Click on FI-Travel

Step 2: Enter the Travel Request Number

Step 3: Click on Search

The screenshot shows the 'Document Retrieval' interface. At the top, there is a title bar with a hamburger menu icon and the text 'Document Retrieval'. Below this is a section titled 'Document Types' with a search icon and a search bar. A red arrow labeled 'Step 1' points to the 'FI - TRAVEL' option in a list of document types. Below the list, it says '6 SELECTED'. The next section is 'Document Date' with a date range selector. Below that is the 'Search Type' section with tabs for 'KEYWORDS', 'TEXT', and 'NOTES'. A red arrow labeled 'Step 2' points to the 'TRAVEL - Request Number' search field. Below this are fields for 'TRAVEL - Request Date', 'TRAVEL - Employee ID', 'TRAVEL - First Name', and 'TRAVEL - Last Name'. At the bottom, there is a 'Full-Text Search' section with an information icon and a search bar. A red arrow labeled 'Step 3' points to the 'Search' button in the bottom navigation bar, which also contains icons for a clock, a document, a key, and a list.